GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

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for the
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Development Services Department

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1.0 EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

1.1 THE PURPOSE OF THE STUDY

1.1.1 Background

During the late 1980s, municipalities with substantial areas of land in the Agricultural Land Reserve have been approached to approve a large number of applications for golf courses. The sheer number of applications has caused concern in the municipalities most seriously affected, and raised fears in the community. Community groups have expressed alarm at the choice of site locations, particularly those sites which are environmentally sensitive.

In 1988, an Order-in-Council by the Provincial Government shifted the burden of development approval to the municipalities. The June 16th. 1988, Order-in-Council amended the regulations for the Agricultural Land Commission, which prior to that time had the right to approve or refuse golf course applications for lands in the Agricultural Land Reserve. The order changed the status of golf courses from "conditional" uses to "outright" uses.

Some of the municipal governments, most pressed by the demand, have responded with policy reviews and development guidelines. Despite these efforts, a number of unresolved issues remained, such as :- issues of supply and demand, locational criteria, regulation of golf course development, the impact of the proposals on agricultural land, environmental impacts, and the demand for land from other recreational pursuits. There were also concerns over the impact of golf courses as speculative land development.

1.1.2 The Trend

This trend towards more golf course development is not unique to the Lower Mainland. Golf is increasing in popularity as a recreational activity across Canada and the United States. There is also a rising demand from tourists and this is particularly true of the Study Area. Prior to this Study, no public supply and demand document covering the Area was available. Market studies had been completed by some developers and studies had been completed by municipalities. These studies had focussed, understandably, on their own requirements, including any review of supply and demand assessments.

1.1.3 The Objectives of the Study

The Greater Vancouver Regional District (GVRD) responded to a request from municipalities for more information on golf course development by undertaking this Study. Areas outside of the GVRD were invited to participate in and sponsor the Study. There are two principal objectives of the Study :-

- to identify the future demand for golf course development;
- to suggest locational criteria and related information to assist municipalities in establishing or refining development controls for golf courses.

1.1.4 The Study Area

The area covered by the Study is the Lower Mainland including the Greater Vancouver Regional District, the regional districts of Dewdney-Alouette, Fraser-Cheam, Central Fraser Valley and part of Squamish-Lillooet Regional District.

1.1.5 Economic Impact

Golf is a big business. The National Golf Foundation (NGF) estimates that in 1985, 20.7 million people spent $7.4 billion on the sport and associated activities in the United States of America. This 1985 figure, if applied to the Study Region without any allowance for exchange rate, but allowing for 5% annual inflation since 1985 and an estimated 190,000 golfers in the Study Area, indicates that over $89 million was spent in the Lower Mainland last year (1990). This estimate assumes that each golfer in the Lower Mainland spent $470 on golf and associated activities, including expenditures at the course, travel, accommodation, clothing and equipment.

1.2 THE SUPPLY AND THE DEMAND

1.2.1 The Supply

The current supply of all facilities including golf courses, pitch and putt courses and driving ranges is 86. The current supply of golf courses in the Study Area is 66 existing courses, with 8 approved for construction as of December 31, 1990. It should be noted that throughout the study period, the data has constantly changed, because of applications made and approvals given or denied.

1.2.2 The Average Golfer in the Lower Mainland

The picture of the average golfer has been well documented in studies by the National Golf Foundation (NGF) and by a recent study of golfing in Alberta. In general terms the average golfer, at this point in time, is male, from a white collar profession, having above-average household income and with an above-average level of education.

Approximately 11% of British Columbians over the age of twelve play some golf. This is among the highest level in Canada or the United States. Most golfers are men, but this situation seems to be changing. According to the National Golf Foundation studies, 41.1% of beginning golfers were women, with this percentage having increased every year since 1985. In Alberta, 50% of women golfers had started golfing within the last four years.

The population of the Lower Mainland will grow by over 1 million people by 2011, with the older age cohorts growing fastest. The profile of golfers shows that golfers over the age of 40 play significantly more rounds of golf than those under 40. The people that are over 40 are the fastest growing population segment in the Study Area. These lead to the assumption that golf will grow faster than the average rate of population growth.

1.2.3 Summary of Recreational Golf Demand Methodologies

Behind the demand projections shown in this Study there has been considerable research to build up a demand methodology unique to this report. The salient points are as follows :-

- Based on growth in population alone, the number of golfers will increase in the Study Area by 2.8% each year to 1996 and 2.5% each year from 1996 to 2011.
- An increasing propensity among women to play golf will contribute to increases in the overall participation rate for golf to 13.2% by 1996 and to 15.5% by 2011. This is still lower than the current participation rate in some US states with similar or less favourable climates than British Columbia. This growth will cause the number of golfers to increase by 5.3% each year to 1996, and also from 1996 to 2011.
- The main impact of the changing age structure is to increase the number of golfers in the over 40 years age group. This group plays more rounds of golf than younger players. This will further increase the growth rate of demand for golf when measured in terms of rounds played. The demand will increase at 5.7% per annum through to 1996 and at 6.8% from 1996 to 2011. As can be

seen the impact of this aspect of demand growth does not become strong until after 1996, and will continue past 2011.

1.2.4 Conclusions on Recreational Golf Demand Methodology

While several different methods were reviewed for projecting recreational golf demand, no one method stood out as producing numbers which had any greater validity than any other method. All methods projected a considerable growth rate for golf, beyond the rate at which the overall population is growing.

A 4% per annum increase in golf over the next 25 years seems quite conservative when the base of overall population growth is considered. A 4% increase by 1996 will essentially result in a doubling of the demand for golf by 2011. The projections for recreational golf demand on which the rest of this Report is based are as follows :-

	Study Area Population(+%)	Golfers(+%)	Rounds(+%)
1986	1,550,000	160,000	2,850,000
1996	1,975,000(28%)	223,000(40%)	4,000,000(40%)
2011	2,518,000(62%)	318,000(99%)	6,000,000(100%+)

1.2.5 The Demand and the Facility

The demand is also related to the kind of facilities provided, each course and facility having a different "golf experience". The golf industry in the Study Area is fragmented within a spectrum of clubs and courses from world class to graded field. Courses range from exclusive and private to semi-public, and those open entirely to the public on a pay-as-you-play basis. Courses are privately owned in single ownership; owned by the membership of the club; owned by non-playing members and shareholders; owned by members with the course on publicly owned land; owned by municipalities and leased to private operators. The demand on municipally-owned courses is the highest, mainly because of course location in higher density areas but also because of the usually lower cost of a round of golf. Many semi-private/private and privately operated public courses are very successful and will continue to be successful because of locations and quality of golfing offered; some privately-operated public courses are marginal in that the courses are poorly located and offer a lesser golfing experience than presently expected by the average golfer.

1.2.6 Tourism Demand

The demand side is also influenced by tourism marketing strategies and perceptions of recreational opportunities for potential visitors to the region. The golf industry has also recognized that there is much to be gained through linking golf courses with real estate and resort development. As the major elements of current tourism marketing are considered, golf plays a significant role in many of them. For instance the convention tourism market is said to be heavily oriented to resorts as preferred destinations, and resorts with quality golf are favoured by convention planners. Marriot Hotels, one of the largest developers and managers of hotels and resort/convention facilities, claim that 95% of their resort/convention business is influenced by the availability of golf courses. The business tourist is also courted with golf - both by resort hotels and by the traditional downtown hotels which have established arrangements with local courses. The format of development agreements in the Resort Municipality of Whistler is tailored to suit the tourist requirement.

In British Columbia, the second largest industry is tourism. There are world class resort facilities within a 2 hour drive of downtown Vancouver. The income from tourist revenues creates an opportunity to build a golf industry that is world-class. The demand for golf from tourism is not met in the Study Area and there is competition from other B. C. regions, mainly the Okanagan.

The Project Team is not in any better position than the B. C. Government, Ministry of Tourism to project demand. The strategy of the Ministry is to establish a Tournament quality course, together with one or two other resort courses of 27 or 36 holes. In addition, there is a need for 3 or 4 other high quality courses which could be on an itinerary for longer tours or second visits, or by those who wish to play other courses; some existing courses could meet this need.

With the above assessment in mind, 5 additional courses to meet tourism demand should be constructed by 1996, followed by a further 5 courses by 2011.

1.2.7 The Total Demand

While many factors influence the growth of demand for recreational golf, in the opinion of the Project Team the demand from the residents of the Study Area can be satisfied by the creation of an additional 19 courses, combined with the five courses for tourist golf these will bring the total number of Lower Mainland golf courses to 90 by 1996. It is estimated that an additional 24 courses for recreational golf will be required to meet the demand between 1996 and 2011 and a further 5 courses will be needed to meet tourism demand for a total of 119 courses by the year 2011. The establishment of these courses will also meet the demand for tournament golf. In summary, the numbers are as follows :-

- 1990 : 66 existing courses
- 1996 Recreational Demand : 19 courses
- 1996 Tourism Demand : 5 courses
- Total Courses in 1996 : 90

1.2.8 Supply and Demand

Eight courses in the Study Area were approved for construction at December 31st. 1990. Therefore, to meet the demand in 1996, a further 16 courses, in addition to those approved for construction, will have to be built by 1996. There are no statistics that can be reported on the demand for driving ranges. In summary, the numbers are as follows :-

- 1990 : 8 courses approved for construction
- Total Additional Courses proposed 24
- Additional courses required to 1996 : 16

In summary, in order to maintain supply and demand equilibrium in the Lower Mainland, the supply is and will have to be as follows :-

- Existing courses, 1990 : 66
- Additional recreational courses required by 1996 : 19
- Additional tourism courses required by 1996 : 5
- Total number of courses required by 1996 : 90
- Additional courses therefore required by 1996 : 24
- Courses approved for construction, December 1990 : 8
- Additional courses required for construction by 1996 : 16
- Additional courses required between 1996 and 2011 : 29
- Total number of courses in the Lower Mainland in 2011 : 119

1.2.9 The Sub-regions

For the purpose of a greater understanding of supply and demand potential, the Study Area has been divided into Sub-regions on the basis of geography and density of population. The Sub-regions are as follows :-

Sub-region #1	(Urban Core) the municipal units of Vancouver, New Westminster, Burnaby, Coquitlam, Port Coquitlam, Port Moody, Richmond and the University Endowment Lands
Sub-region #2	(North Shore/Whistler) the municipal units of West Vancouver, North Vancouver (City and District), and the Regional District of Squamish-Lillooet
Sub-region #3	(Valley South) the municipal units of Delta, Surrey, Langley (City and Township), and White Rock
Sub-region #4	(Valley North) the Regional District of Dewdney-Alouette, including Maple Ridge and Pitt Meadows
Sub-region #5	(Valley Central) the Regional Districts of Central Fraser Valley and Fraser Cheam

The likely future supply of golf courses, that has to be met by Sub-region is expected to be as follows :-

	Current	1996	2011
Sub-region #1	23	25	27
Sub-region #2	8	12	16
Sub-region #3	19	29	41
Sub-region #4	6	10	16
Sub-region #5	10	14	19
Total	66	90	119

The following comments can be made about each Sub-region :-

Sub-Region #1 - Urban Core

- The Sub-region's golf demand will have to be met in other sub-regions. This implies an increased travel-to-golf distance for sub-region residents.
- Every effort should be made to maintain the existing courses.
- Every effort should be made to encourage the development of new courses.
- There is considerable scope for a municipality to become involved with the development of new golf courses, as is happening in Burnaby.
- Courses which use less land, but which are of high quality should be encouraged; in this regard, the executive courses and the challenging 9-hole regulation courses are models which should be explored.
- Golf 'centres', consisting of a driving range, practice greens and three regulation holes, should be encouraged.
- Courses should be encouraged as part of major residential developments.

Sub-region #2 - North Shore/Whistler

- Every effort should be made to encourage the development of new courses on the North Shore.
- There is considerable scope for a municipality to become involved with the development of new golf courses, as is happening in Burnaby.
- Courses which use less land, but which are of a high quality should be encouraged close to the population centres on the North Shore; in this regard, the executive courses and the challenging 9-hole regulation courses are models which should be explored.
- Full size regulation courses should be encouraged in the Squamish area, to serve both the Whistler resort and the population on the North Shore.
- Golf 'centres', consisting of a driving range, practice greens and three regulation holes, should be encouraged on the North Shore
- Courses should be encouraged as part of major residential developments.

Sub-region #3 - Valley South

- Given this factor, the development of courses should be allowed beyond this figure, if the Urban Core Sub-region does not reach the level of course development outlined earlier (25 by 1996, 27 by 2011).
- Provision of courses on the western and northern edges of the sub-region, and close to major transportation routes should be encouraged.

- Full size regulation courses should be encouraged to serve both the tourism market and the local recreational demand.
- Courses should be encouraged as part of major residential developments.
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.
- A study of the degree to which the sanitary land fill components of Burns Bog could provide additional courses in the medium and long term, should be undertaken.

Sub-region #4 - Valley North

- This Sub-region has considerable scope to absorb additional demand, given its proximity in terms of travel time to the expanding municipalities of the Urban Core Sub-region.
- Course development should be particularly encouraged in the western part of the area.
- Full size, regulation courses should be encouraged to serve both the tourism market, the local recreational demand and demand from the Urban Core Sub-region.
- Courses should be encouraged as part of major residential developments.
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.

Sub-region #5 - Valley Central

- This sub-region has considerable scope to absorb additional demand, but proximity to the transportation corridor of Highway #1 is critical to serving demand from the Core Sub-region.
- Caution should be exercised regarding the development of courses away from Highway #1, especially if they involve major infrastructure investments.
- The expanding population base of the sub-region will, by 2011, support only the present number of courses. Therefore any major new courses must be oriented to demand from outside the sub-region - either recreational golfers from the other sub-regions, or the tourist market.
- Courses should be encouraged as part of major residential developments, but only after the demand from outside that residential area has been assessed.
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.

In summary the existing and future situation in the Sub-regions is as follows :-

EXISTING GOLF FACILITIES

	Full Size	Par 3	Pitch & Putt	Driving Ranges
Sub-region 1	15	2	6	9
Sub-region 2	5	1	2	1
Sub-region 3	8	6	5	7
Sub-region 4	4	1	1	1
Sub-region 5	6	4	0	2
STUDY AREA TOTAL	38	14	14	20

Total of Full Size, Par 3, Pitch & Putt : 66

NEW GOLF FACILITIES approved December 31st. 1990

	Full Size	Par 3	Pitch & Putt	Driving Ranges
Sub-region 1	1**	0	0	0
Sub-region 2	2*	0	0	0
Sub-region 3	2	2	0	1
Sub-region 4	0	0	0	1
Sub-region 5	1	0	0	1
STUDY AREA TOTAL	6	2	0	3

Total of Full Size, Par 3, Pitch & Putt : 8

**Riverway, Burnaby; under construction

*includes Northlands, North Vancouver District; approved to design concept.

NEW GOLF FACILITIES pending December 31st. 1990

	Full Size	Par 3	Pitch & Putt	Driving Ranges
Sub-region 1	1	0	1	0
Sub-region 2	2	0	0	0
Sub-region 3	14	3	0	1
Sub-region 4	3	0	0	0
Sub-region 5	6	5	0	1
STUDY AREA TOTAL	26	8	1	2

1.2.10 The Applications in the Study Area

Almost all of the applications for golf course development are for land in the Agricultural Land Reserve. The Agricultural Land Reserve (ALR) is land in seven classifications, ranked for agricultural capability. The classifications are not just based on the quality of soil, but can be influenced by such factors as climate, salinity of the soil and stoniness. Details are provided in Chapter 13.0.

Between 1978 and June 1988, the Commission received 72 applications for development of land for golf courses and facilities in the Agricultural Land Reserve. 24 of the applications were within the Study Area as follows :-

7 Regulation Courses
7 Par 3 Courses
10 Driving Ranges

The ALC approved 40% of the applications as follows :-

4 Regulation Courses
3 Par 3 Courses
3 Driving Ranges

It should be noted that the applications included new facilities on existing courses and additions to existing facilities. None of the eventual approvals were on Class 1, 2 and 3 agricultural land.

As can be seen in the following table, the applications were not confined to the Lower Mainland and indeed on a per capita basis, the number submitted for the Lower Mainland was half that for the rest of the province. With the exception of driving ranges, the Study Area was, however, the recipient of approximately half the applications.

Between June 1988 and December 1990, The Agricultural Land Commission received the following applications in the Study Area :-

	Regulation Courses	Exec./Par 3 Courses	Pitch & Putt	Driv'g Ranges	Facilities	Multi-Uses	TOTALS
Central Fraser Valley	1	1					2
Dewdney-Alouette	6				1		7
Fraser Cheam	4	4		2		1	11
GVRD	20	8	1	3		2	34
Squamish-Lillooet	2						2
SUB TOTALS	33	13	1	5	1	3	56
The applications for the remainder of British Columbia are as follows :-							
	34	12	3	15	4	4	73
TOTAL	67	25	4	20	5	7	129

Source: Summary of Golf course Applications
Agricultural Land Commission, January 1991

1.2.11 The Courses Constructed

The 1980s saw very few golf courses added to the inventory in the Study Area. Only Coyote Creek in Surrey, Mayfair Lakes in Richmond and Poppy Estates, in Langley, were developed during this period and all the courses were in the Agricultural Land Reserve. Some driving ranges were constructed.

The inclusion of golf courses within the Agricultural Land Reserve, as a conditional use from 1978 to 1988, did force developers to focus on marginal agricultural land and prepare applications which would be considered favourably by the Commission. But the process could not keep pace with growing demand, and caused frustration in the development community. That the flood gates opened as soon as the 1988 Order-in-Council was passed, was to be expected. But the new planning framework and its many applications, which generally paid little heed to the environment and locational setting of the site, have been unsuccessful in increasing the supply of courses. In the rush to develop golf course applications, non-agricultural land has been almost entirely overlooked.

1.2.12 Availability of Finance

Supply is heavily dependent upon the availability of financing. In the past, the capital cost of a golf course has been easily financed by a group of investors, usually the membership. Today's land costs place the development costs beyond the capability of the small investor. Canadian investors tend to look at golf course development as a short term investment. Foreign investors see the investment as longer term and this can be seen in the number of golf courses being purchased or investigated for purchase by off-shore buyers. For example, the Japanese interest in the west of Canada is brought about by the high cost of golf in Japan, due to high land costs. In British Columbia, up to this time, there has been little experience in golf course financing. Nonetheless, capital amounts exceed what can be counted from conventional funding sources. As the industry matures, financing will become increasingly available.

1.3 APPROVAL PROCESSES AND LOCATIONAL CRITERIA

1.3.1 Complexities : Natural Landscape with Many Jurisdictions

The measurements of supply and demand clearly indicate opportunities for golf course development in the Lower Mainland. These opportunities exist, however, in the context of a region that has an inherent complexity of natural landscape and urban development. The land use of this setting, coupled with the dynamics of a rapidly growing population and increasing demands on land and water use, is complicated by an ever changing jurisdictional and regulatory framework. This is particularly the case in the rural areas, where most of the proposed golf courses are located.

The distribution of major land use activities is greatly influenced by legislation and, therefore, by the policies and programs of federal, provincial, regional and local governments, which may have conflicting goals. Prospective land and water users, including golf course developers, must not only gain appropriate approvals but meet the acceptance of an increasingly aware public that is concerned with such issues as environmental protection, agricultural land preservation and wildlife habitat conservation. The roles and interests of various government agencies in golf course development are reported in the Study.

1.3.2 The Municipal Approval Process

Golf course development applications require review by federal and provincial government agencies, and approval by municipalities with due regard to Official Community Plans and zoning by-laws. During the 1978-1988 period, a municipality could rely on the Agricultural Land Commission to approve only those applications which were compatible with the land capability for agriculture and the agricultural community; thus many zoning bylaws have golf courses as permitted uses in agricultural zoning. Since the change in legislation, the municipalities have carried the full burden of decision making. Applicants continue to have to make submissions to the Agricultural Land Commission if the proposal is in the Agricultural Land Reserve. The Commission can place conditions on the proposal but cannot refuse applications.

1.3.3 The Municipal Experience

The municipal approaches and the planning requirements for golf course and associated development are varied. Different standards abound. This is particularly the case with regard to parking requirements and set-backs from property lines. The former is a proven area requirement regardless of location, the latter is a critical safety factor requirement, common to all courses. Most municipalities have had by-laws covering golf courses and driving ranges for many years. These regulations vary from very brief requirements, incorporated into recreational or agricultural zoning bylaws, to very specific and extensive requirements in a golf course zoning bylaw. Land use regulations for unorganized territory are minimal and focus on access and parking. In recent years, as applications were processed by the municipalities under greatest pressure, their planners, the developers making the applications, the communities and the councils became knowledgeable and aware of the requirements and development implications of golf course development.

Golf development occurs in zoning districts other than those related to golf or agriculture. North Vancouver District and Burnaby, for example, include golfing activities on land zoned for parks, wilderness and open recreation uses. In Vancouver, some golf courses continue to be on land zoned for single family housing. The Resort Municipality of Whistler includes golfing activities on land zoned for rural resort uses. In the Vancouver case, where some courses are on land zoned for single family residences, there will always be a potential for courses, particularly private ones, to be lost to development, and this is in the Sub-region with highest demand.

Whistler has successfully used the proposal call process to acquire and control golf course development, with extensive requirements beyond those of a zoning bylaw. Recently, West Vancouver used a similar proposal call process. The course was rejected by public vote, which does not imply that the Proposal Call approach is invalid. Burnaby has for some years offered golf as part of its recreational program and is presently constructing a new course. There are no private courses in Burnaby. Vancouver has very successful municipal courses with plans for upgrading.

Ledgeview Golf Course in Matsqui and Gleneagles Golf Course in West Vancouver are two examples of municipalities purchasing existing facilities and changing the access from private/semi-private to public use. The first was acquired as the course was failing financially. The second was acquired after the membership had decided to replace the course on lower cost land.

1.3.4 The Concerns and the Opportunities

Many people hold the view that agricultural land must be protected and that golf courses are more than an intrusion; golf courses are seen by some as the "thin end of the wedge" of speculative land development. The Agricultural Land Commission (ALC) and others see some golf course applications as basically large scale land speculation. The many offers for sale of existing golf courses and sale of property during the approval process give some weight to this opinion. There is ample evidence to support the theory that golf courses have been transitional land uses. There is concern that this speculation impacts not only agricultural lands, but also wildlife habitat, wilderness areas, wet lands and other lands of ecological sensitivity. This view has been clearly heard in places as different in terrain as Delta and West Vancouver.

The basic infrastructure of communities can be changed by golf course development, and this may be the least understood impact. By way of illustration, a municipality may have urban focal points separated by agricultural land (Delta has three; North Delta, Ladner and Tsawassen). Golf course development in the heart of agricultural land, even if the land is marginal for agricultural purposes, may initiate another urban centre. Not only is the urban structure and character of the municipality changed irreversibly, the agricultural community will also be displaced.

On the other hand, golf course development can provide a buffer between disparate land uses and create open space and recreational opportunity in an otherwise densely developed urban area. A golf course, particularly if the land is in public ownership, may be the one open area that remains as development surrounds it.

As the region grows and urban areas spread, the ability to maintain open and green space will be critical. This concern for open space is expressed as one of the objectives in the Greater Vancouver Regional District's document "Creating our Future : Steps to a more Livable Region". A "stand-alone" golf course can be part of green space. A golf course generates economic activity in and around it. A golf course with proper safety areas can offer outside recreational activities for the non-golfer. Public footpaths, hiking trails or horse riding trails are some of the examples in existence or being planned for courses in the area. The Study provides golf course locational criteria for review and adoption by regional districts and municipalities.

1.3.5 Concerns of Community Groups

The location of golf course proposals has caused public action. The actions of community groups and interested citizens, concerned over the consequences of golf course development, have been seen at the ballot box, in the complete turn-around of a decision on golf course development and changes in the make-up of municipal councils. There is general concern over the cumulative impact of golf courses, particularly in the rural areas of the region and specifically in the Agricultural Land Reserve. But the concerns can be quite specific, and not necessarily related to agricultural land.

There are concerns over the use of chemicals on golf courses, even though chemicals used are controlled by statute. This is as much an operational management problem as it is a regulatory one. Historic trees and heritage items, invasion of bird and wildlife habitat and life-cycle patterns, erosion of wetlands, impact on floodplains, use of water resources, fears of unexpected additional development following golf course failure, fears of increases in taxation to cover golf course failures, and the fundamental concern that the golf course development is serving just a select few, appear to be the main issues.

1.3.6 The Golfer and Course Location

Once the golfer has accepted the loss of a local course, the driving time becomes part of the recreational equation. The experience that once took half a day now takes the whole day. Inevitably, the golfer expects a higher level of golfing experience than at the local course. The "out-of-town" course has to include a larger clubhouse offering food services and associated support facilities such as showers and lockers. Partly because of the change in location coupled with perceptions of what an ideal golfing experience should be, the golfer now demands a higher quality product. The cost to both enthusiast and recreational golfer inevitably escalates. They both compete with tourists for time on the better courses. The cost of golf for the pay-as-you-play golfer has escalated by 20% over the last twelve months. The cost of membership in a private club is beyond the means of all but a few and waiting lists are the norm. One result is Lower Mainland golfers are using courses in Washington State on a regular basis. Some of these U.S. courses report 75% use by Canadians.

1.3.7 The Cost of Development and Location

The concerns of the community groups have to be balanced by the risk and financial reality of the development industry. Location is essential to the success of golf course development and control of development costs is an essential tool for the project manager. The Study shows that the costs of land and construction in the Lower Mainland are usually too high for new courses to be supported only by revenue from golfing activities. This raises the question as to why there have been so many applications. Obviously, the demand alone is sufficient to attract development. How many of the applicants explored in detail the capital cost of development and the implications on course operations is not known.

Quite clearly, financial risk is greater in the early years of a new course. This requires the developer, who is particularly concerned about the short-haul, to seek a broader base of investment through associated land development. This development may take the form of housing, hotel, convention facilities and possibly golf as part of a multi-faceted recreational activity centre. Inclusion of other recreational facilities is seen in submissions and in recently constructed courses.

There are recent models in the Study Area, that are well located, well developed, well managed, and provide a high level of golfing experience with other activities. These courses will succeed and because they meet the demand with a "golfing experience" of some quality have many financial options in the future.

One development alternative that requires less of a physical infrastructure to ensure success is one in which the developer can make arrangements to discount the land value through favourable long-term lease from the land owner. Yet another alternative is the sale of the course, following development or even during the approval process, to an "off-shore" buyer. This is also another reason for the number of applications.

The Study shows that a new course has a high level of financial risk and Canadian financing agencies have been slow to respond to the demand. There is a role for both public and private involvement in the golf course development.

1.3.8 The Public Need and the Municipal Obligation

Much of the concern generated by golf course development stems from its private sector orientation and a feeling that there is a lack of commitment by the developers to the long term investment. There is also the question of the location of courses to serve the Sub-regions with greatest demand. These concerns can be overcome, and the economics of running a course made easier if there is public sector involvement in course development. There are opportunities, based on good examples in the Study Area, to combine the capabilities of the public sector to moderate land values and manage the grounds, with the private sector operating the golfing and associated activities. Full size publicly owned courses, such as Fraserview in Vancouver, Burnaby Mountain in Burnaby and others generate income far exceeding operational costs, unlike other municipally-supported recreational activities. Counteracting this is the argument that municipal land can be developed for a higher and better use with revenues supporting other recreational activities. This has been heard in North Vancouver District.

The golfing experience should be seen by municipalities as part of a well-rounded recreational program. Depending on location, the facilities can be more readily provided by the public sector. One consequence of municipal involvement is that the course has a good probability of remaining the green element in an urban setting of increasing density. By incorporating public pathways, bikeways, and other recreational opportunities with landscaped open areas, there can be benefit to the community as a whole with a greater likelihood of public acceptance.

1.3.9 Locational, Zoning Criteria

Concern over the location of a golf course is the one common subject that has caused the most controversy in recent months. The Study includes a list of locational criteria for golf courses. The criteria are written as questions about course location. The criteria can be used by both municipalities and developers to evaluate submissions. At the wish of municipalities, these items could influence the writing of zoning bylaws. The questions include :-

- What is the distance and time from the market served ?
- Is the proposal central to a perceived residential or other catchment area ?
- What is the adjacency or proximity to an existing or future highway ?
- What is the adjacency to a tourist or travel focal point/travel node ?
- What is the topography of the site and is it conducive to golf course development and are there any unique physical features on the site that may mitigate or enhance the opportunities for golf course development ?
- Is the proposal on land not used for agriculture or on low grade agricultural land in the Agricultural Land Reserve ?
- Is the proposal on the peripheral edges of agricultural land and acting as a buffer between agricultural land and other land uses such as housing and wilderness ?
- How is the site to be drained and what are the implications ?
- What is the source of the water supply for irrigation and domestic water ?
- What is the method of waste management, treatment and disposal ?
- What is the impact on other utility, engineering and fire fighting systems ?
- What is the land capability and suitability for fish and wildlife in general ?
- Could the proposal have specific environmental or other impacts, such as impacting wetlands, heritage or historic land uses, mature trees and other vegetation, flight paths and habitat of migratory birds ?

By contrast, the Study outlines a series of negative criteria, which if followed would cause the denial of golf course applications. Golf courses should :-

- Not be in the centre of agricultural land areas, regardless of land quality
- Not be in site situations where agricultural land becomes isolated by development of the golf course
- Not be in site situations where access to golf course facilities interfere with established agricultural traffic patterns

- Not be in site situations where access to associated facilities to golf courses interferes with established agricultural traffic patterns
- Not be in site situations where the exterior lighting and golfing and other recreational activities interferes with established farming practices, particularly with regard to livestock

The Study also provides a general list of site, siting and design criteria. Again, at the wish of municipalities, these criteria could selectively be incorporated into zoning bylaws.

1.3.10 The Business Plan

There is no way of knowing how many of the applications have been preceded by market analysis and the writing of a business plan. The recent successful larger courses are clearly the product of considerable research and an understanding of the marketplace. The Project Team recommends all developers prepare such a plan; the Study provides a checklist of subjects, although there is no guarantee of acquiring approvals and no guarantee of finding appropriate financing.

A completed business plan would not only be assessed by the financiers but could be reviewed by a municipality during the planning process. The business plan format offers a systematic way of addressing a plethora of planning issues and regulatory authorities and requirements. The plan, in whole or in part, could form the basis of a development agreement with a municipality. The information provided could equally form the basis for lease agreements between municipalities and lessors of public golf courses.

The use of the business plan could reduce concerns over the legitimacy of the proposal and possible golf course failure. It would also provide municipalities with an understanding of the limitations under which an application is made and place into perspective any municipal demands of the applicants for capital expenditures, outside of usual development costs.

1.3.11 Taxation

The Study includes a chapter on municipal taxation. The response by a municipality to a golf course application requires some assessment of the taxation implications. There are no rules of thumb. Each course should be evaluated on its own merits.

1.4 CONCLUSIONS AND RECOMMENDATIONS

1.4.1 Meeting the Demand and the Supply

Golfing is clearly a justified recreational form and suited to the nature of the Study Area. It meets both local and non-local demand and can be given a definite place in the development of the region. The supply is provided by both the public and private sectors. The Project Team recommends :-

- **That the targets described in this Study for the "optimum" number of golf courses by Sub-region should be met through development by both the public and private sectors, so that by 1996 there will be an additional 19 courses (excluding those now under construction or approved) to meet local demand and an additional 5 golf courses constructed to meet the tourism demand. The supply and demand situation should be reviewed by the GVRD again in 1996.**

1.4.2 Supply by the Public Sector

There is a continued and important role for the public sector. The supply and the cost of golfing requires moderation of fees, if the recreation is to be reasonably accessible and affordable in the high demand urban areas where land costs are also high. There is also a need to overcome the concerns about the change of land use that could follow golf course failure. All this can be done if the municipality is the developer and landlord and there are good examples to follow in the Study Area. The Project Team recommends :-

- **That provincial, regional and municipal park and other public lands should be investigated by each government for golf course development potential: municipalities should include golf as a component of their recreational programs and be the developers and managers, where necessary, of properly located public golf courses.**

The implication of this recommendation is that regional government and municipalities must consider the supply and demand outside of their land areas to include the Study Area of this report. There is an opportunity to build on the experience of Study Area public golf course models, and include other publicly provided recreational activities with the golf course developments.

1.4.3 Supply by the Private Sector

The private sector has provided and is providing affordable golf, particularly in the lower land cost Sub-regions of the Study Area. Nonetheless, the community has serious doubts about the motives behind recent golf course development proposals. If the industry is seen to be negating the role of providing unique, yet affordable golfing experiences to the Lower Mainland public by, for example, selling to off-shore buyers or seeing the land use as short term and transitional, it will find even less support for the development of the privately owned course. There is, therefore, a risk that the demand from golfers in the Study Area and the demand from golfing visitors will be met elsewhere in British Columbia and in the USA., with a consequent loss of recreational and economic opportunity for the Lower Mainland. The industry will have to bring a higher level of planning and design skills to the developmental process and in doing so accept the real costs of professional services. There are applications prepared by local professionals that are first-class in content and presentation. The Project Team recommends :-

- **That the private sector must be prepared to spend more time and money preparing a business plan to clearly identify the market segment to be served and to show what impact the course will have on local demand and tourism demand for golf, and to prepare site surveys and environmental impact assessment studies as may be required.**

1.4.4 Locational Criteria

The Study provides criteria for the location of golf courses, with due regard to accessibility and impacts on agricultural land, the agricultural community and the environment. To have any benefit the locational criteria must be implemented consistently across the Study Area. The Project Team recommends :-

- **That the B. C. Government and municipalities in the Study Area should incorporate the list of locational criteria, if not already incorporated, in planning regulations.**

1.4.5 Regional and Agricultural Land Use and Location of Golf Courses

Municipalities bear the burden of decision making regarding golf course use on agricultural land. Municipal land use decisions are specific to applications within the municipal boundary, yet the demand for golf and the location of high quality agricultural land crosses municipal and regional boundaries.

The subject of agricultural land use in the Study Area requires a longer term outlook, beyond a municipal boundary and beyond the electorate at the municipal level. The Agricultural Land Commission has fulfilled the longer term outlook function. The weakness is that the ALC is responsible for only a single land use. The Project Team recommends :-

- **That B. C. Reg. 238/88, Section 2 (1)(M), which permits golf course development within the Agricultural Land Reserve and removes the Agricultural Land Commission's power to prohibit such developments, should be rescinded by the Government of British Columbia.**

1.4.6 Protection of Agricultural Land

The higher classifications of land in the Agricultural Land Reserve should have protection from any and all development, including golf course development. The Project Team recommends :-

- **That no portion of a golf course proposal should contain soils with Land Capability for Agriculture Class 1, 2, or 3, under improved conditions (drained and irrigated) with exceptions being for isolated pockets of agricultural land within non-Agricultural Land Reserve land, confined by urban uses.**

1.4.7 The Place for Golf Course Development

Agricultural land of lower capability has been approved by the Agricultural Land Commission and municipalities for golf course development. Frequently the land is marginal and better developed for non-agricultural purposes. There is also land available that will never be suited to agricultural use. The Project Team recommends :-

- **That non-agricultural land should be the preferred location for golf courses and if such land is unavailable or the locational criteria cannot be met then land of Agricultural Classes 4, 5 ,6 and 7 in the Agricultural Land Reserve should be the alternative place for golf course development.**

1.4.8 A Lower Mainland Golf Development Plan

Golf course development requires thorough and extensive planning processes by both municipality and developer. It also requires systematic assessment and approval processes so that the negative impacts can be minimized and the recreational and economic benefits optimised for the Lower Mainland community.

Developers need direction as to what facilities will be approved and where, and information on what regulatory bodies have to be part of the process. The industry, which has had little developmental success in the recent past, would welcome a planning framework. The Project Team recommends :-

- **That the Greater Vancouver Regional District should prepare a Lower Mainland Golf Development Plan. While encouraging development it should also have due regard for implementing and monitoring processes, with a sensitivity for the complexity of the subject, the vast body of public and private interest in golf course development, and the planning frameworks that already exist at the regional and municipal levels.**

1.4.9 Zoning Bylaws and Development Agreements

There are differences, usually with justification, in the schedules of zoning requirements from municipality to municipality, but the parking requirements and safety factors are common to all courses regardless of location. There are also minimal requirements, which should be upgraded, for land development in unorganized territory. The Project Team recommends :-

- **That the B. C. Government and municipalities should review their land use legislation with a view to bringing greater commonality in golf course zoning schedules with particular reference to the requirements for parking and on-and-off-course public safety.**

1.4.10 New Approaches to Golf

The golfing industry has, in the Study Area, taken a conservative approach to the development of golf course facilities. Recently constructed courses and applications are generally based on prevailing and accepted traditional golf course layout and design standards, not recognising the inevitable trends responding to limited land availability, accessibility and location. The Project Team recommends :-

- **That municipalities should encourage developers, through changes to land use regulations, to seek innovative ways of providing affordable public golf experiences requiring less land in areas closer to urban centres and in zones not presently allowing golf course uses such as retail, commercial, and industrial zones.**

1.4.11 Community Concerns : Site Location and the Environment

The concerns of the community focus on the location of golf courses and the consequences of development on the community and the environment. While there are federal and provincial regulatory agencies and legal mechanisms that can be used by municipalities to meet or mitigate these concerns, golf course development is still fraught with differences of perception between community and developer. Some of this is brought about by the absence of,or the minimal approach to "front-end" research and surveys of the site by the developer. At least one development proposal has been denied because the developer did not understand the details of environmental issues until it was too late. Somehow, the concerns for potential impacts need to be aired right at the outset. It is noted that some municipalities do bring information on golf course development out in the open at the beginning; others await the rezoning process. The Project Team recommends :-

- **That the information requirements, including appropriate studies and surveys, (with particular regard to the environmental impacts relating to site location and development) should be clearly established between the municipality, and the developer. At the beginning of the application there should be due regard for the informational requirements of the B. C. Government, Ministry of the Environment and the Ministry of Highways and Transportation, the B. C. Agricultural Land Commission, the Canadian Wildlife Service, Fisheries and Oceans Canada, the regional district, and any other government and community groups, as may be determined by the nature of the proposal. At the very least, an information meeting to examine the likely impacts and establish a timetable, should be held by a municipality with the developer at the start of the process.**

1.4.12 Community Concerns : Failures and Finances

The notion that a golf course is designed to fail, so that a higher and better value land use can be justified, is a real concern to regulating agencies and the community. On the other hand, municipalities, not aware of the financial implications on a golf course economic proforma, have applied conditions for approving development. While the conditions may have seemed to be entirely justified and there has been agreement between developer and municipality, the financial impact may have guaranteed golf course failure, unknown to the municipality. The Project Team recommends :-

- **That prior to rezoning, municipalities must be assured of the financial viability of the golf course application and seek appropriate information relating to the financing and operation of the proposed or modified golf course over a horizon of five, ten or more years.**

This is particularly necessary if the applicant is obliged to cover such capital costs as extended utilities and roadways, and environmental monitoring.

1.4.13 The Golf Industry, Environmental Concerns and Management

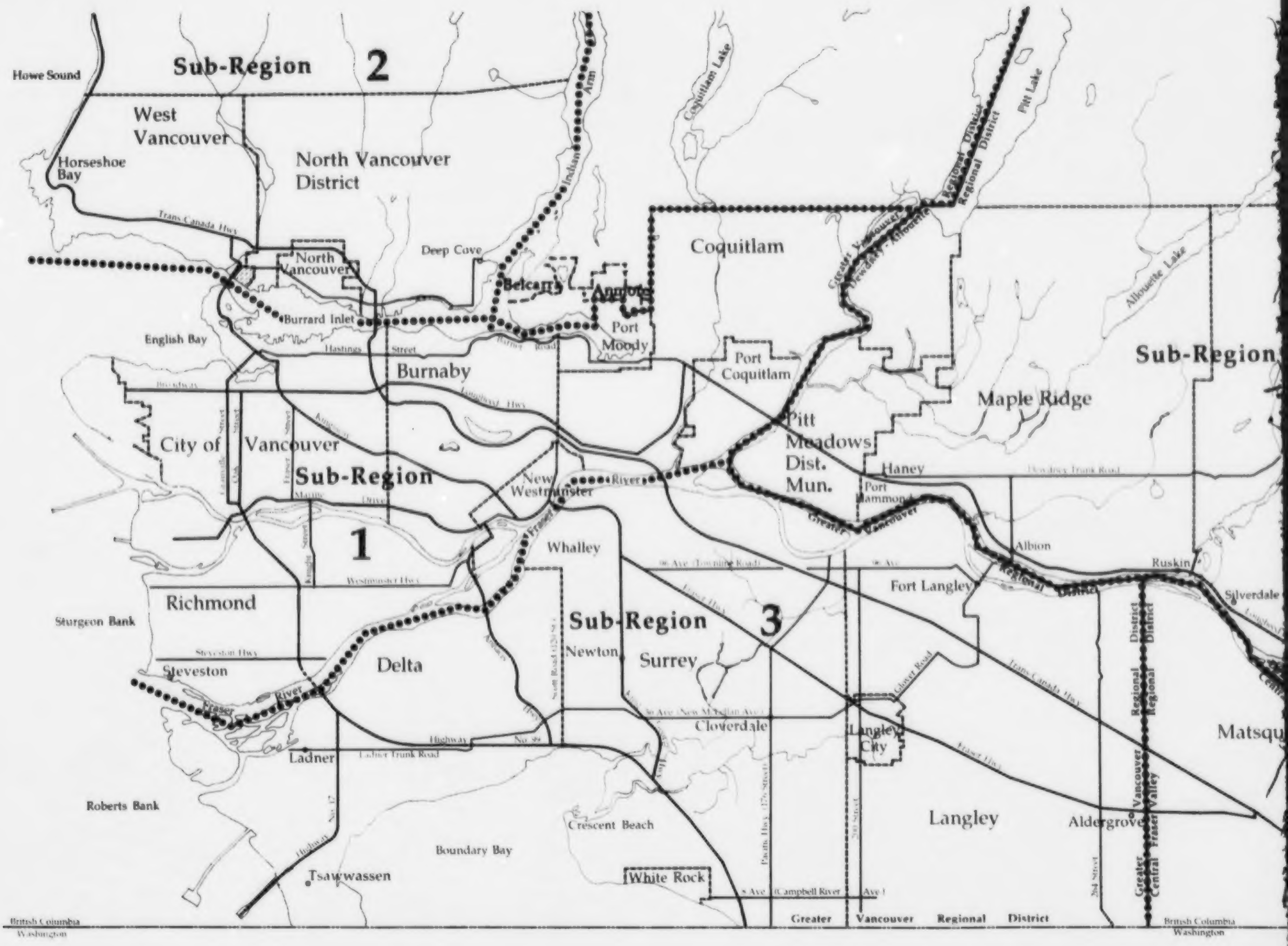
To meet the challenge caused by the demand, the golfing industry will have to provide higher quality facilities at affordable prices; higher levels of management and technical skills will be required. Course superintendents are beginning to use high technology to regulate irrigation and other systems and in doing so, they have greater control over possible environmental impacts. Community colleges already offer relevant courses. The Project Team recommends :-

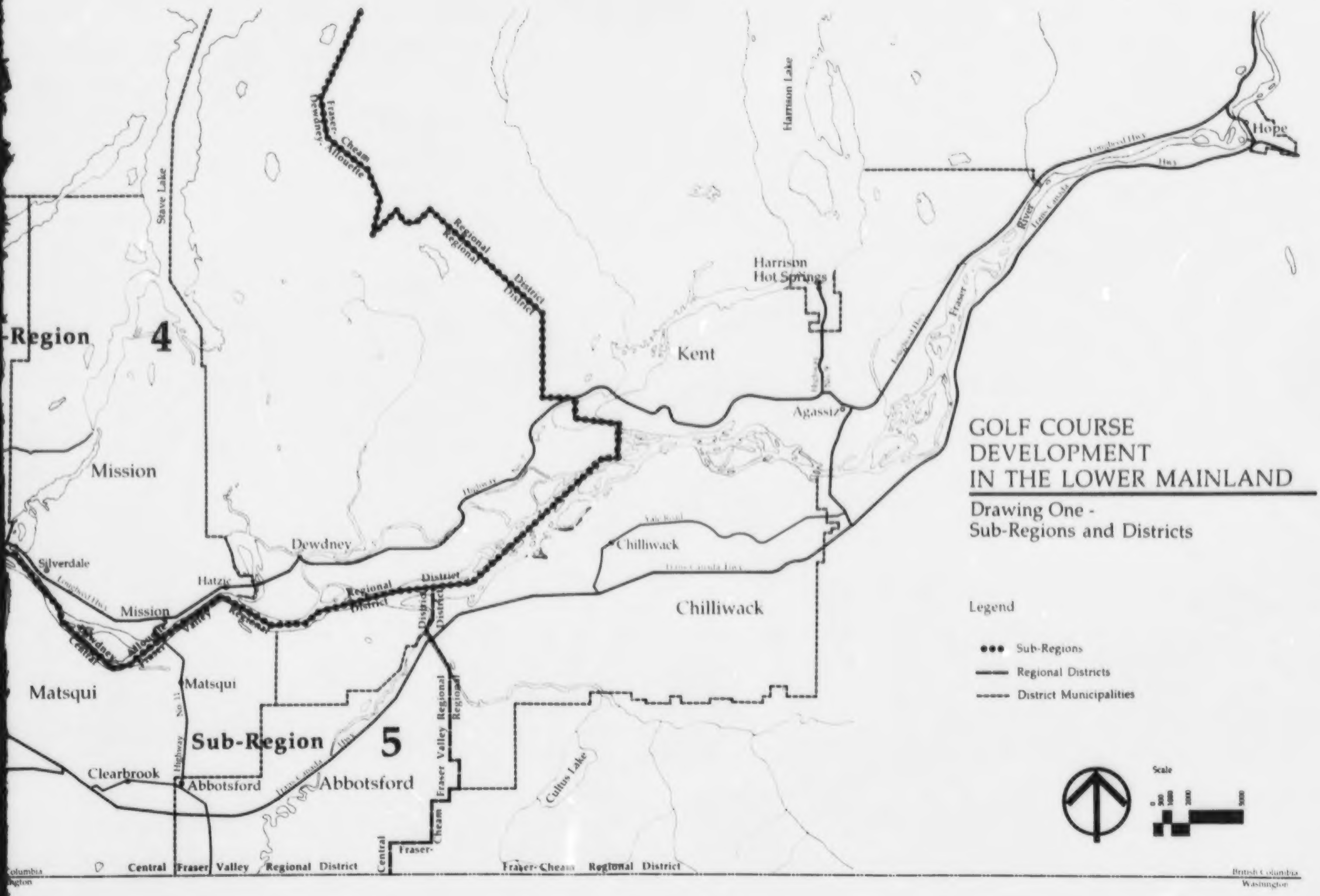
- **That the golfing industry should review with the B. C. Government, Ministry of Advanced Education and Job Training and Ministry of the Solicitor General, the establishment of a body for the specific licensing, education and certification of golf course managers, operators and groundskeepers.**

1.4.14 The Province

This Study is for a specific area in British Columbia. It reports that golfers cross regional district and municipal boundaries. They also seek golfing experiences elsewhere in British Columbia, other provinces and the United States of America. The expansion opportunity for tourism and the attraction of major tournaments to the Study Area exists in a provincial context. The Province has already investigated opportunities related to tourist development. This Study cannot report on or relate to an overall provincial picture. The Project Team recommends :-

- **That the B. C. Government, Ministry of Development, Trade and Tourism, and the Ministry of Municipal Affairs, Recreation and Culture, and the Agricultural Land Commission and others, should collaborate in the preparation of a policy framework for provincial/regional golf course development.**

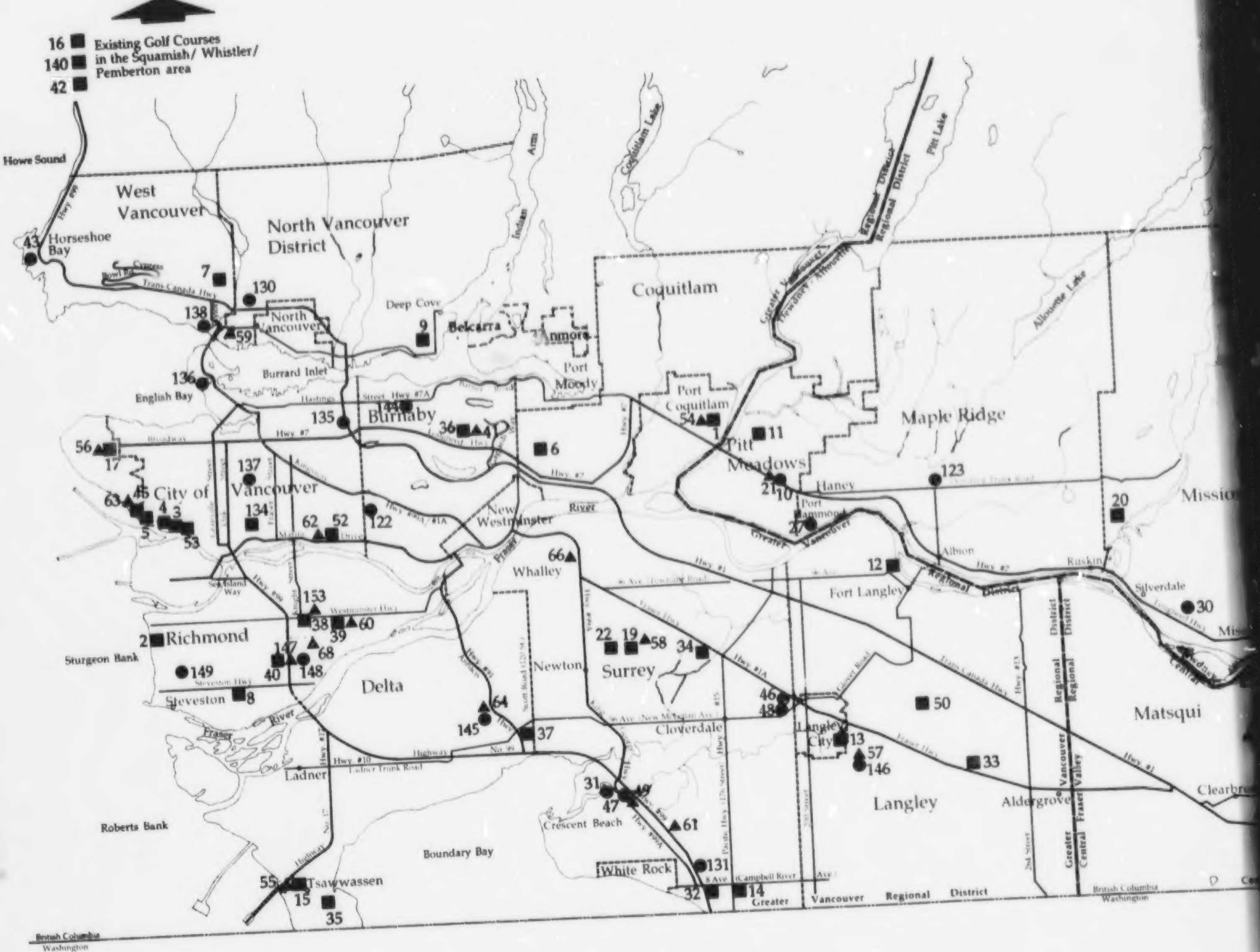

Howe Sound
Sub-Region 2
West Vancouver
Horseshoe Bay
North Vancouver District
Trans Canada Hwy
North Vancouver
Deep Cove
Indian Arm
Belcarra
Anmore
Port Moody
Burrard Inlet
Coquitlam Lake
Coquitlam
Pitt Lake
Greater Vancouver Regional District
Dewdney-Alouette Regional District
Alouette Lake
English Bay
Hastings Street
Barnet Road
Burnaby
Broadway
Lougheed Hwy
Port Coquitlam
Sub-Region
Maple Ridge
City of Vancouver
Kingsway
Granville Street
Oak Street
Fraser Street
Knight Street
Sub-Region 1
Marine Drive
Pitt Meadows Dist. Mun.
Haney
Dewdney Trunk Road
Port Hammond
New Westminster
Fraser River
Greater Vancouver Regional District
Whalley
Albion
Ruskin
96 Ave (Townline Road)
Westminster Hwy
Fort Langley
Silverdale
Richmond
Sturgeon Bank
Sub-Region 3
Fraser Hwy
Newton
Surrey
Steveston Hwy
Steveston
Delta
Trans Canada Hwy
Glover Road
56 Ave (New McLellan Ave)
Cloverdale
Langley City
Highway No. 99
Ladner Trunk Road
Ladner
Scott Road (120 St)
Matsqui
Greater Vancouver Regional District
Central Fraser Valley Regional District
Roberts Bank
Crescent Beach
Boundary Bay
Pacific Hwy (176 Street)
200 Street
Langley
Aldergrove
264 Street
Highway No. 17
Tsawwassen
White Rock
8 Ave (Campbell River Ave)
Greater Vancouver Regional District
British Columbia
Washington



GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

Drawing One - Sub-Regions and Districts

Legend
●●● Sub-Regions
—— Regional Districts
----- District Municipalities
Scale
-Region 4
Sub-Region 5
Stave Lake
Harrison Lake
Fraser-Cheam
Dewdney-Alouette
Regional
Regional
District
District
Mission
Dewdney
Kent
Agassiz
Harrison Hot Springs
Hope
Chilliwack
Chilliwack
Silverdale
Hatzic
Mission
Matsqui
Matsqui
Clearbrook
Abbotsford
Abbotsford
Cultus Lake
Fraser
River
Dewdney
Central
Fraser
Valley
Regional
District
Regional
District
District
District
Central
Fraser Valley
Regional
Regional
Cheam
Fraser-
Central
Central Fraser Valley Regional District
Fraser-Cheam Regional District
Columbia
ngton
British Columbia
Washington


16 ■ Existing Golf Courses
140 ■ in the Squamish/ Whistler/
42 ■ Pemberton area
Howe Sound
West Vancouver
Horseshoe Bay
North Vancouver District
North Vancouver
Deep Cove
Belcarra
Anmore
Port Moody
Coquitlam
Coquitlam Lake
Indian Arm
Pitt Lake
Alouette Lake
Burrard Inlet
English Bay
Burnaby
Port Coquitlam
Pitt Meadows
Maple Ridge
Haney
Port Hammond
Albion
Ruskin
Mission
Silverdale
City of Vancouver
New Westminster
Fraser River
Whalley
Fort Langley
Richmond
Sturgeon Bank
Steveston
Delta
Newton
Surrey
Cloverdale
Langley City
Langley
Aldergrove
Matsqui
Ladner
Roberts Bank
Boundary Bay
Crescent Beach
White Rock
Tsawwassen
Greater Vancouver Regional District
Central Fraser Valley Regional District
British Columbia
Washington
Trans Canada Hwy
Hwy #1
Hwy #7
Hwy #99
Hwy #10
Hastings Street
Broadway
Marine Drive
Sea Island Way
Westminster Hwy
Steveston Hwy
Fraser Hwy
8 Ave
43
7
130
138
59
9
136
135
144
36
4
6
54
1
11
21
10
123
27
20
12
30
56
17
137
63
45
4
3
5
53
134
62
52
122
66
153
38
39
60
2
22
19
58
34
147
68
40
148
149
8
64
145
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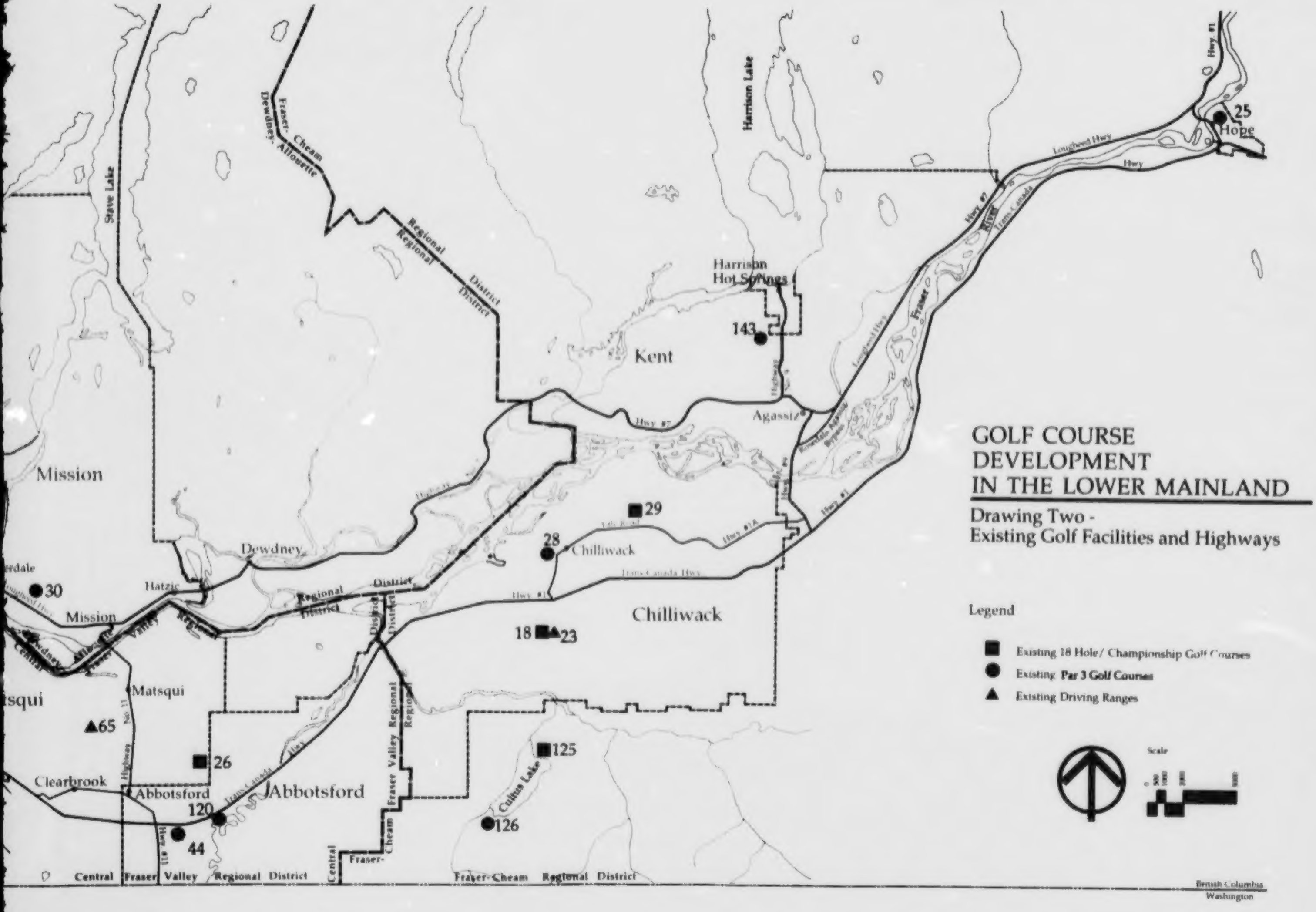
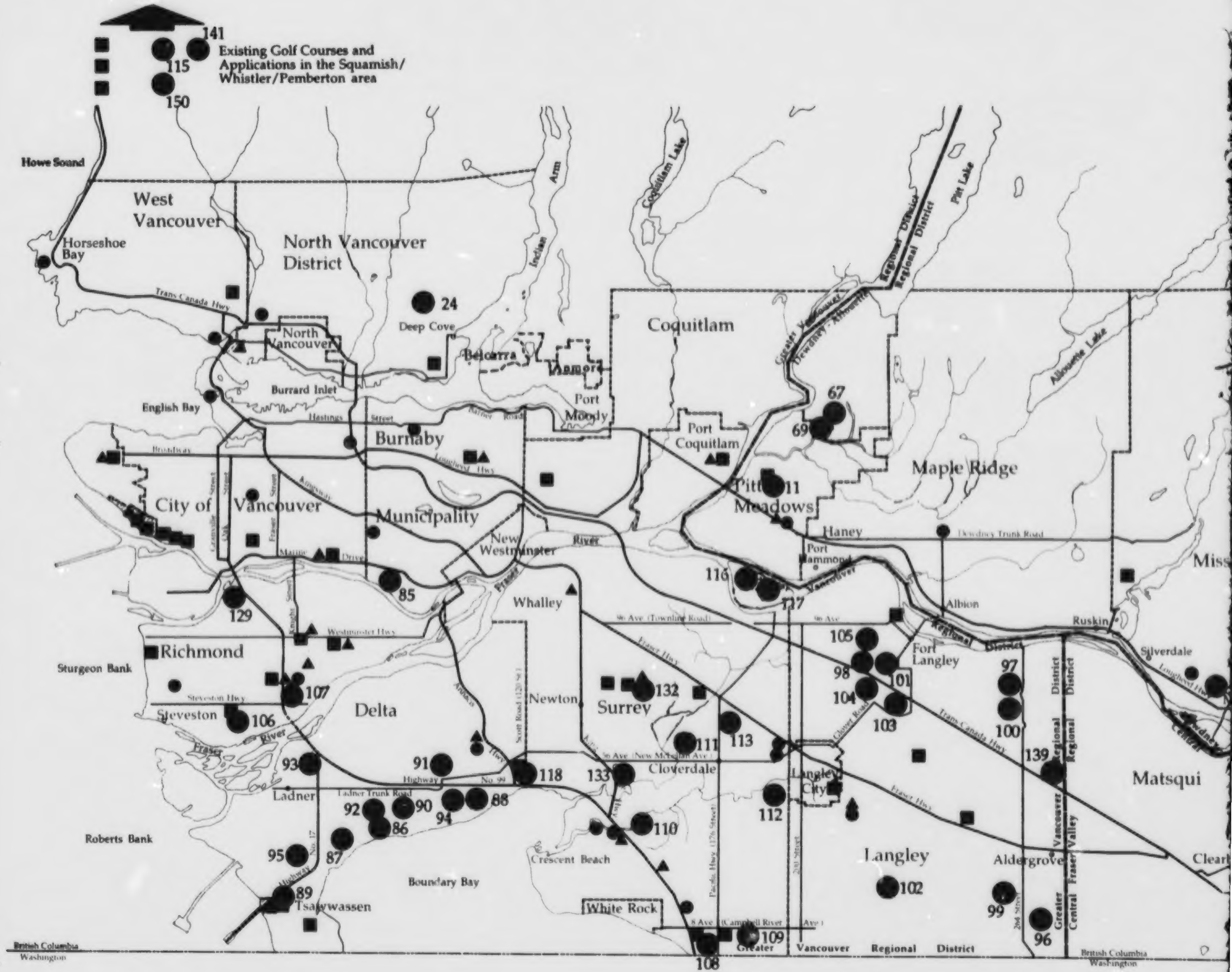
61
131
32
14
55
15
35

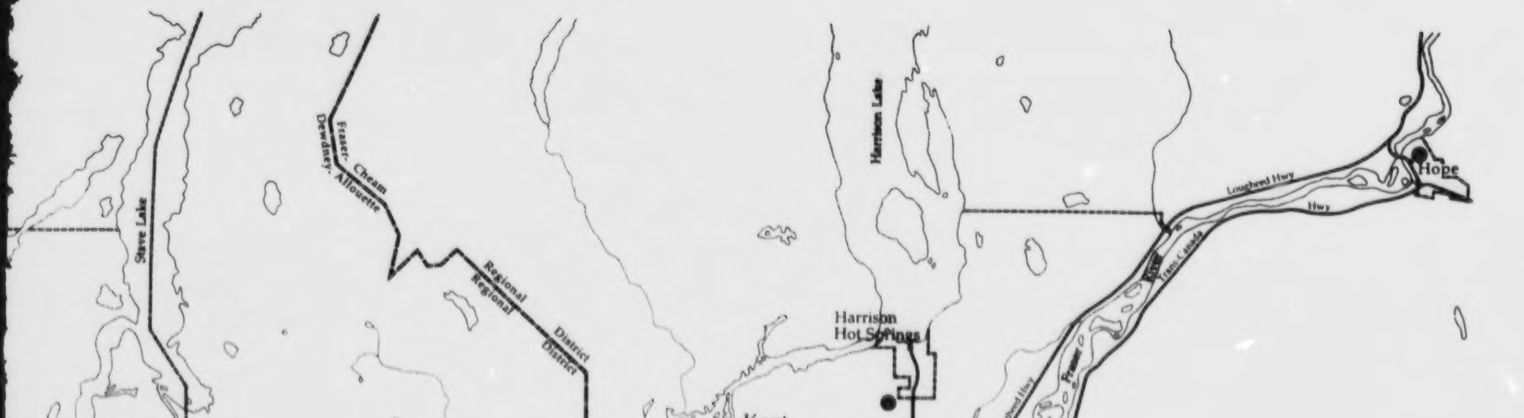


GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

Drawing Two - Existing Golf Facilities and Highways

Legend
■ Existing 18 Hole/ Championship Golf Courses
● Existing Par 3 Golf Courses
▲ Existing Driving Ranges
Scale
Stave Lake
Fraser-Cheam
Dewdney-Alouette
Regional District
Harrison Lake
Harrison Hot Springs
143
Kent
Agassiz
Hwy #7
Lougheed Hwy
Hwy #1
Trans Canada
Fraser River
25
Hope
Mission
Dewdney
Hatzic
30
Mission
Central Fraser Valley Regional District
29
28
Chilliwack
Yale Road
Hwy #1A
Trans Canada Hwy
18
23
Chilliwack
Matsqui
65
26
Clearbrook
Abbotsford
120
44
Abbotsford
Highway No. 11
125
Cultus Lake
126
Fraser-Cheam Regional District
British Columbia
Washington


141
115
150
Existing Golf Courses and Applications in the Squamish/Whistler/Pemberton area
Howe Sound
West Vancouver
Horseshoe Bay
Trans Canada Hwy
North Vancouver District
24
Deep Cove
Indian Arm
North Vancouver
Belcarra
Anmore
Port Moody
Burrard Inlet
English Bay
Hastings Street
Barnet Road
Burnaby
Lougheed Hwy
Broadway
Kingsway
Granville Street
Oak Street
Fraser Street
City of Vancouver
Municipality
Marine Drive
New Westminster
River
85
129
Coquitlam Lake
Coquitlam
Port Coquitlam
Pitt Lake
Greater Vancouver Regional District
Dewdney - Alouette Regional District
Alouette Lake
67
69
Pitt Meadows
11
Maple Ridge
Haney
Dewdney Trunk Road
Port Hammond
116
117
Albion
Ruskin
Miss
Silverdale
Lougheed Hwy
Fraser
Whalley
96 Ave (Townline Road)
96 Ave
Fraser Hwy
Knight Street
Westminster Hwy
Richmond
Sturgeon Bank
Steveston Hwy
Steveston
107
106
Fraser River
Delta
Annacis Hwy
Scott Road (120 St)
Newton
Surrey
132
113
111
56 Ave (New McLellan Ave)
Cloverdale
133
118
93
91
Highway No 99
Ladner
Ladner Trunk Road
92
90
94
88
86
87
95
Highway No. 17
89
Tsawwassen
Roberts Bank
Boundary Bay
Crescent Beach
110
Pacific Hwy (176 Street)
200 Street
112
Langley City
Glover Road
105
Fort Langley
98
101
104
103
Trans Canada Hwy
97
100
139
Matsqui
Langley
Aldergrove
Clear
102
99
96
264 Street
White Rock
8 Ave (Campbell River Ave)
109
108
Greater Vancouver Regional District
Central Fraser Valley Regional District
Dewdney Central
British Columbia
Washington



GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

Drawing Three - Existing Golf Facilities and Applications

Legend

- ● Golf Course Applications
- ■ Existing 18 Hole/ Championship Golf Courses
- ● Existing Par 3 Golf Courses
- ▲ Existing Driving Ranges

Scale
0 500 1000 2000 5000
Steve Lake
Fraser-Cheam
Dewdney-Allouette
Regional Regional
District District
Harrison Lake
Harrison Hot Springs
Kent
Agassiz
Highway No. 9
Hope
Lougheed Hwy
Hwy
Trans Canada
Fraser
Mission
Dewdney
Hatzic
verdale
71
Mission
Highway No. 7
Central
Fraser
Valley
Regional
District
tsqui
Matsqui
No. 11 Highway
Clearbrook
Abbotsford
Abbotsford
Trans Canada Hwy
70
84
83
121
Yale Road
Chilliwack
Chilliwack
Trans Canada Hwy
74
78
79
77
82
72
80
81
75
76
73
Cultus Lake
119
Fraser-Cheam Regional District
Central Fraser Valley Regional District
British Columbia
Washington

NOTES

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need
and establish Locational Criteria.

2.0 INTRODUCTION

2.0 INTRODUCTION

2.1 Background

The economic prosperity of the late 1980s and the consequent building boom has made demands on the infrastructure of Lower Mainland suburban municipalities. At the same time, those municipalities with substantial areas of land in the Agricultural Land Reserve have been approached to approve a large number of applications for golf courses. The sheer number of applications has caused concern in the municipalities most seriously affected, and raised fears in the community. Community groups have expressed alarm at the choice of site locations, particularly those sites which are environmentally sensitive.

In 1988, an Order-in-Council by the Provincial Government shifted the burden of development approval to the municipalities. The June 16th. 1988, Order-in-Council amended the regulations for the Agricultural Land Commission, who prior to that time had the right to approve or refuse golf course applications for lands in the Agricultural Land Reserve. The order changed the status of golf courses from "conditional" uses to "outright" uses.

Some of the municipal governments, most pressed by the demand, have responded with policy reviews and development guidelines. Despite these efforts, a number of unresolved issues remained. These were with regard to issues of supply and demand, locational criteria, regulation of golf course development, and the impact of the proposals on agricultural land, environmentally sensitive land issues, and the demand for land from other recreational pursuits. There were concerns over the impact of golf courses as speculative land development.

2.2 A Complex Landscape with Many Jurisdictions

In the Study Area, the inherent complexity of natural landscape and urban, coupled with the dynamics of a rapidly growing population and increasing demands on land and water use, is complicated by an ever changing jurisdictional and regulatory framework. This is particularly the case in the rural areas, where most of the proposed golf courses are located.

The distribution of major land use activities is greatly influenced by legislation and the policies and programs of federal, provincial, regional and local governments, which may have conflicting goals. Prospective land and water users, including golf courses developers, must not only gain appropriate approvals but meet the acceptance of an increasingly aware public that is concerned with such issues as environmental protection, agricultural land preservation and wildlife habitat conservation. The roles and interest in golf course development of various government agencies is reported in the Study.

2.3 The Study Area

The area covered by the Project Team is the Lower Mainland including the Greater Vancouver Regional District, the regional districts of Dewdney-Alouette, Fraser-Cheam, Central Fraser Valley and part of Squamish-Lillooet. In geographic terms, the area is from the Pemberton Valley to Hope, and from the international boundary to the slopes of the Coastal Range of mountains, including the Lower Mainland of British Columbia.

2.4 The Study

This Study is a response to the requirements defined by the Greater Vancouver Regional District. In the process of the work, the Project Team has tried to uncover the myths and realities that surround this sporting and recreational activity and the change in which golf courses are now seen as an element of multi-land use development.

The purpose of the Study is to provide an analysis of the problems of regulating golf course development proposals under recent changes in jurisdictional authority. It presents an inventory of the various types of golf facilities and the potential demand for new golf courses. It describes and evaluates locational criteria. The report examines the impact on agricultural land and environmentally sensitive areas and briefly comments on land for other recreational uses. The Study, which covers a vast subject range in a large geographic area, is built around a response to a series of questions. The questions asked of the Project Team were :-

EXISTING SITUATION

- How many and what type of golf courses are there in the Lower Mainland ?
- Which markets are served by Lower Mainland golf courses ?
- What has been the experience with established golf courses ?

EVALUATING THE NEED

- What is the demand for various types of golf course facilities ?
- Where is the demand coming from ?
- Which market would we be serving ?
- What are the benefits of golf course development ?
- What are the conflicts with competing land uses ?
- Is there consistency in the applications ?
- Are golf courses economically feasible without ancillary development ?
- What are the objectives of provincial government ?

ESTABLISHING LOCATIONAL CRITERIA

- What issues are the community interest groups concerned about ?
- What are the objectives of the municipalities ?
- What are the agricultural implications of golf course development ?
- What are the broader land use implications of golf courses ?
- What are the objectives of the provincial government ?

POLICY RECOMMENDATIONS

- What new policies are recommended ?

2.5 The Study Objectives

The primary objective of the Study is to provide the Regional Districts and Municipalities with a comprehensive framework for the evaluation of golf course applications. The framework is based on the development and assessment of a broad base of relevant information and opinions.

2.6 The Project Team Opinions

The Project Team, a mix of well-qualified professionals and business people, was structured to bring a balanced view to the subject. The Study attempts to present facts, opinions and issues without bias. Comments and advice on golf course development are also offered. Any opinions expressed are those of the Project Team. These opinions have met with consensus of the team. They are for the consideration of the regional districts, the municipalities, other levels of government, the golfing community and industry and interested readers.

2.7 The Study Process

The Study has proceeded in a series of phases that have tended to overlap.

Phase One : The Data Gathering Phase

- The review and development of the Project Team's golf and golfing industry data base.
- An interview program which included participating agencies, member municipalities, regional districts, selected golf courses in the subject area, and appropriate Ministries in the Government of British Columbia.
- A telephone interview program with selected golf courses in the study area.
- A review of relevant published materials.

The data has been gathered around the following subject areas :-

- Existing supply of golf courses.
- Applications for golf courses.
- Local and regional demand for golf courses.
- Tourism demand for golf courses.
- Environment impacts of golf courses, including competing land uses and the agricultural land reserve, watershed and other implications.
- A written approach to community groups, identified by the GVRD, and people expressing an interest in the subject.
- Meetings with community groups and individuals at their request.
- Meetings with people of the golfing and real estate industries, at their request.
- A review of financial and fiscal aspects of golf course development from the perspectives of the industry and government.
- The development of an understanding of positions and perceptions on golf course development from provincial and municipal government sources, federal agencies such as the Canadian Wildlife Federation and others.
- The development of an understanding of positions and perception of golf course development from individuals, including directors of planning and recreation and their staff in the Study Area; selected mangers of private and public golf courses; representatives of green superintendents in British Columbia.

Phase Two : Data Base Analysis

The collected data was reviewed with particular regard for :-

- A demand analysis and demographic profiles of golfers.
- Existing golf courses - a variable inventory from addresses, accessibility, facilities, organization, type, membership, usage, parking, grounds maintenance, financial aspects, development being considered and development potential, adjacent land uses, etc.
- Applications for golf course development including an assessment.
- Mapping of comparative planning data to show locations and types of golf courses, general relativity to existing residential areas, overall/regional traffic patterns.

Phase Three : Data Analysis

The collected data has been reviewed with respect to :-

- An overview summary report of data gathered and assessed.
- Golf course supply issues.
- New golf course applications issues.
- Local demand issues.
- Tourism demand issues.
- Municipal experience issues and concerns.
- Private and development sector concerns.
- Overall land use perceptions and expectations.
- Environmental issues and concerns.
- Financial and fiscal matters.
- Provincial objectives and other matters.
- Policy and procedure options and considerations.

Phase Four : Data Synthesis/Final Report

Workshops were held, involving members of the steering committee of the GVRD, prior to publication of the Study. The participants were selected members of the Project Team and members of the Technical Advisory Committee of the GVRD.

2.8 The Setting for the Work

The study subject is complex. Golf is many things to many people. Golf is a consuming passion for some and a preferred recreation for others. Golf course development and the consequence of development are at issue, rather than golfers and golfing. Some see golf course proposals as "the thin end of the wedge" of development and an intrusion in agricultural lands. Others see golf course development meeting a proven need and providing investment opportunity. Golf and golf course development is a subject that has been extensively reported, researched and reviewed from a broad spectrum of interests. This information tends to be in discrete parcels. The compartmentation reflects the historic aspects of recreational golf and the emerging nature of golf as a spectator sport, with implications for the entertainment, land development and tourism industries. The Study data base has been reviewed against information from the US National Golf Foundation.

2.9 "Creating of Our Future"

The Study Area has, in a century, changed from a base of natural resources with modest and separated communities to a substantial urban and rural infrastructure that is increasingly service oriented. Growing concerns over what we are doing to the environment have also influenced land use decision making. It has resulted in people getting together to look at frameworks for regional actions. "Creating Our Future : Steps to a Liveable Region", a framework document approved by the Board of the Greater Vancouver Regional District in September 1990, eloquently describes actions that recognise, for example, the contradictions between regional co-ordination and local autonomy, the balancing of individual demands and choices against the cumulative environmental impacts on the region. What is quite clear is that the Lower Mainland and certainly the developable land in it, is confined and limited by natural features and an international boundary.

2.10 Golfers and the Lower Mainland

Golfers are as mobile as their mode of transportation. They cross municipal, regional, provincial and international boundaries and use public and private property. Their search for new and different "golfing experiences" has substantially changed the way the experience is provided, with the location and setting and cost of the experience being critical to the success of a course.

2.11 Studies by Municipalities and Others

Some municipalities have extensively studied the supply, demand and locational criteria for golf courses. Others, less impacted by applications from developers, have welcomed applications and dusted-off their zoning bylaws. The municipalities closest to the urban core of the region, particularly Delta, Surrey and Langley, were faced with the greatest number of applications. Since the Order-in-Council to December 1990, Delta alone received 17 proposals of interest and 9 applications.

Elsewhere, the provincial government has examined the potential for golf course development as it relates to tourism. Recently, the Agricultural Land Commission has completed a seminal work looking at the potential for development on non-agricultural land in the Study Area.

2.12 Positions on Golf Course Development and Data Gathering

As the work has unfolded, the positions on golf course development taken by some municipalities has completely changed. A referendum rejected a golf course proposal that was not on agricultural land. A municipal council saw itself substantially changed because of feelings about golf course development expressed at the ballot box. Some of this change can be attributed to concerns being raised by community groups. Considering the number of applications, very few golf courses are fully approved and awaiting construction. To complicate things, the introduction of the Goods and Services Tax has impacted the golf course and data gathering. Inevitably, this changing situation has created some difficulties for the Project Team in keeping abreast of base information. This will be seen by the reader in the establishment of a cut-off date for reporting applications, as reported in

Appendix Exhibit "A" and in some inaccuracies in the data on golf courses in Exhibit "B".

2.13 Municipal Experience

The municipal approach and the planning requirements for golf course and related development is varied. Many justifiable differences abound. For many years, most municipalities have had bylaws covering golf courses and driving ranges. These regulations vary from very brief requirements incorporated into recreational or agricultural zoning bylaws to very specific and extensive requirements in a golf course zoning bylaw. As a general rule, municipalities further away from the urban centre of the region are less restrictive in their zoning requirements. Bylaw clauses in these situations have been written with an agricultural use in mind which rarely show, for example, an understanding of the public safety aspects of the golfing activity. Following the Order-in-Council, three municipalities closer to the urban core extensively reviewed their planning positions, zoning bylaws, locational criteria and processes because of pressure from the volume of applications. Delta, Surrey and Langley did seminal planning work in that regard. Staff in these municipalities became specialized in the subject. In recent years as applications were processed, planners, developers and the communities came to a greater understanding of the requirements and development implications of golf course development.

Municipalities, as in North Vancouver and Burnaby, include golfing activities on land zoned for parks, wilderness and open recreation uses. In Vancouver, some golf courses continue to be on land zoned for single family housing. The Resort Municipality of Whistler includes golfing activities on land zoned for rural resort uses. Whistler has successfully used the proposal call process to acquire and control golf course development, with extensive requirements beyond those of a zoning bylaw. Burnaby has for some years offered golf as part of its recreational program and is presently constructing a new course. There are no private courses in Burnaby. Ledgeview Golf Course in Matsqui and Gleneagles Golf Course in West Vancouver are two examples of municipalities purchasing existing facilities and changing the access from private/semi-private to public use.

2.14 Conclusion

Clearly, there are differences in the schedule of zoning requirements from municipality to municipality. Some differences are justified because of the wishes of the community. Delta, for example, seeks to ensure that buildings on golf courses have a certain architectural scale. It must be noted that there are minimal requirements for golf courses in unorganized territory. It is not the wish of the Project Team to deny these differences. However, there are fundamental requirements for parking and public safety that are common to all courses, regardless of location.

NOTE : THE RECOMMENDATIONS OF THIS STUDY ARE INFLUENCED BY CONCLUSIONS FROM MORE THAN ONE CHAPTER. FOR DETAILS OF THE RECOMMENDATIONS SEE CHAPTER 21.0

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

3.0 THE EXISTING SITUATION : THE SUPPLY

3.0 THE EXISTING SITUATION: THE SUPPLY

3.1 Introduction

This chapter reviews the current supply of golf facilities in the Lower Mainland and discusses this within an historical perspective. Emphasis is given to the changes to decision-making structures within the last 15 years, with particular reference to the Agricultural Land Reserve.

3.2 Summary of Golfing Facilities in the Lower Mainland

Golf course development and urban growth have always been closely linked. This can be seen in the Lower Mainland as part of the process of urban development. When the history of individual courses is analyzed, their development on agricultural land on the urban fringe, and their sale several decades later for some 'higher and better' use is often seen[1]. That many of the courses in the Lower Mainland have not yet completed this cycle is more a matter of the area's comparative youth, and the specific ownership patterns of the courses, rather than some other urban processes at work.

Agricultural land is not the only land on which new courses are developed. In the Lower Mainland for instance courses have been built on many parcels of land which were previously unused. Such land is now in more limited supply and often, mostly due to terrain restrictions, unsuitable for golf development. Courses are still being developed with examples being those now under consideration for the upland areas of North Vancouver and Coquitlam.

3.3 Policies regarding the Conversion of Agricultural Land

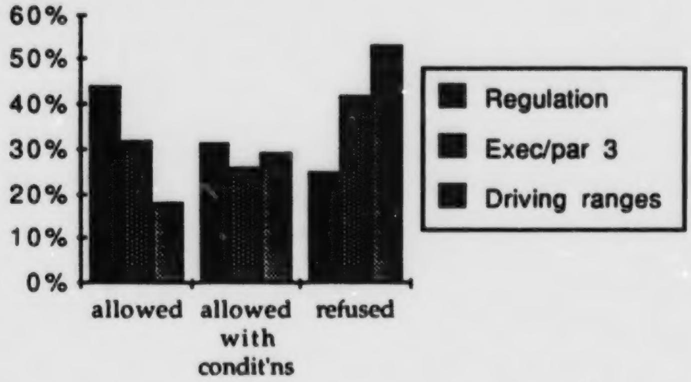
The planning history of the last 20 years in British Columbia has brought policies to bear on the process which have altered this general historical sequencing. In particular, the establishment in 1973 of the Agricultural Land Commission[2], the designation of an Agricultural Land Reserve, and the provision of special regulations which limited the transition of land from agriculture to other uses have been most important. The regulations establish two types of land uses within the Agricultural Land Reserve, one being "permitted" or "outright uses", the other being "conditional uses". Golf courses have been, at various times, in both categories. However from 1978 through 1988 they were a conditional use - one that the Agricultural Land Commission could allow or refuse as it saw fit. During that period 72 applications were received by the Commission for golf related developments. The response of the Commission to these applications is shown in Diagram 1, on the following page :-

---

[1] This is particularly true of the private courses; Quilchena is a good example.

[2] Originally the Land Commission, the term 'Agricultural' was added in 1977, when its powers were rewritten.

Diagram 1 - Golf Related Applications to the Agricultural Land Commission - 1978 to June 1988



Source: Golf Course Applications - 1978/1988
- Agricultural Land Commission
- January 1991

Of the applications, 64% were allowed either outright or with conditions - the most common regarding the siting of any buildings so as to minimize the long-term impact on the reserved land. It should be noted that these lands stayed within the Agricultural Land Reserve (ALR), rather than being excluded from it; it was merely that a non-agricultural use was allowed on the land.
This era, therefore, did allow the conversion of lesser agricultural land to 'higher and better' uses such as golf courses, although with restrictions which were designed to protect the viability of agriculture. The courses allowed were those which had the least impact, and this in turn forced the developers to consider this circumstance as they prepared their applications.

3.4 The Applications in the Study Area

Between 1978 and June 1988, the Agricultural Land Commission received 72 applications. 24 of the applications were within the Study Area as follows :-

7 Regulation Courses
7 Par 3 Courses
10 Driving Ranges

Of these applications 40% were approved as follows :-

4 Regulation Courses
3 Par 3 Courses
3 Driving Ranges

It should be noted that the approvals included facilities on existing courses or additions to facilities. None of the approvals were on Class 1, 2 and 3 ALR land.

3.5 The Order-in-Council

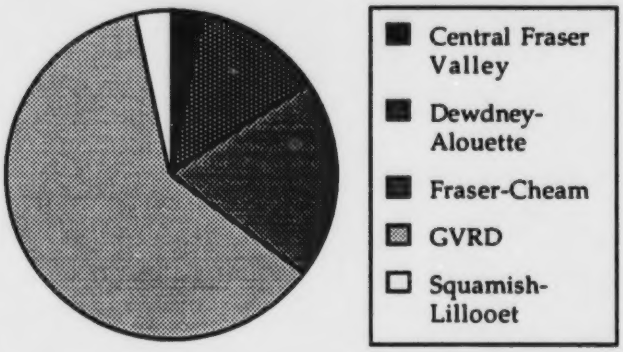
In June 1988, the situation was changed by an Order-in-Council which changed golf courses from conditional to outright uses. They became totally acceptable within reserve lands. The Commission could not refuse applications for golf courses, but merely put conditions regarding the manner of their development. These conditions usually covered the following points :-

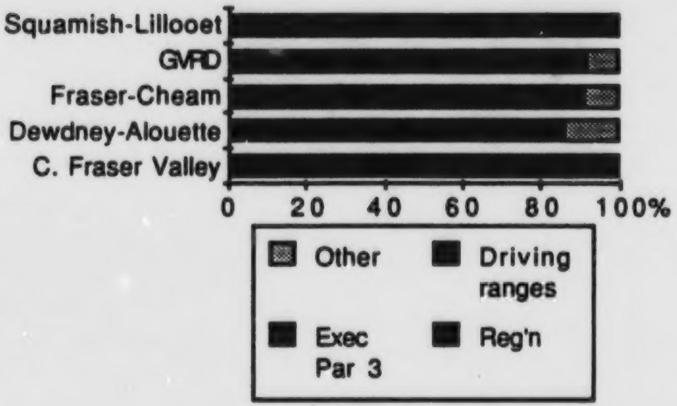
- Preparation of detailed site plans
- Preparation of effective ditching plans
- The consolidation of the land into a single legal unit and registration of a restrictive covenant limiting the use of that land to golf course use
- Fencing and vegetative screening from adjacent agricultural land
- Soil to be neither removed, nor deposited except for building and parking lot foundations
- Siting of buildings and parking lots.

3.6 An Increased Number of Applications

The Agricultural Land Commission had already received, and rejected, an increased number of applications for major golf courses in the period immediately prior to June 1988, a few of which were resubmitted immediately thereafter. In addition, many other applications were submitted in the period from June 1988 through December 31, 1990. These are detailed by type and location in Diagram 2, as follows :-

Diagram 2 - Golf Related Applications to the Agricultural Land Commission - June 1988 to December 31, 1990





Source: Summary of Golf course Applications
- Agricultural Land Commission
- January 1991

The applications were not confined to the Lower Mainland and indeed on a per capita basis, the number submitted for that area was half that for the rest of the Province. With the exception of driving ranges[1], approximately half of the applications were in the Study Area.

3.7 Approval Process

In all this discussion, it did not mean that once the conditions were set and approvals given by the Agricultural Land Commission, development proceeded. The local municipality has always had the power to approve the land use in accordance with its Official Community Plan and zoning by-law. Prior to the Order-in-Council, during the 1978-1988 period, a municipality could rely on the Agricultural Land Commission to approve only those applications which were compatible with the local agricultural community; thus many zoning bylaws had golf courses and driving ranges as permitted uses in agricultural zoning. After the Order-in-Council, municipalities were left without any public consultation defence when applications were made.

3.8 The Municipal Response

The response from local government was initially quite positive to the applications for golf course development. However, the municipalities, and to a lesser extent the ALC, were clearly unprepared for the onslaught of applications. The number of golf course applications, as was to be expected, turned to a flood, particularly in municipalities having both land in the Agricultural Land Reserve and well developed urban centres. These municipalities also tended to be closest to areas of high urban development and at a focal point for commuter travel in the Lower Mainland. The planning departments of the municipalities of Delta, Surrey and Langley prepared studies and developed extensive locational criteria. For example, Langley reviewed the situation with particular regard to golf courses acting as a transitional land use between urban and rural areas and along provincial highways. Surrey did a municipal golf course demand analysis, developed policy recommendations including locational criteria, and proposed additional courses to meet the needs of their municipality. Delta, who was pressed most severely by applications, developed extensive locational criteria and unique design criteria for the clubhouse and associated facilities, reflecting the scale of architectural development in rural areas.

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[1] 50% of all driving range applications were in Kelowna.

3.9 Conclusions

The 1980s saw very few golf courses added to the inventory of Study Area courses. Only Coyote Creek in Surrey, Mayfair Lakes in Richmond and Poppy Estates, in Langley were developed during this period and all the courses were on land in the Agricultural Land Reserve.

The status of golf courses within the Agricultural Land Reserve, which prevailed from 1978 to 1988, did force developers to focus on marginal land and prepare applications which would be considered well by the Commission. The development of courses failed to keep pace with growing demand, and also frustrated the development community. That the flood gates opened immediately after the 1988 Order-in-Council was passed, was to be expected. But the new planning framework and the consequent applications, which also paid little heed to consequences to the environment, have been as unsuccessful in increasing the supply of courses, as the framework prior to the Order-in-Council.

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

4.0 THE DEMAND FOR GOLF : EXISTING & FUTURE SITUATION

4.0 GOLF DEVELOPMENT IN THE LOWER MAINLAND

4.1 Introduction

This chapter discusses the various types of golf facilities and courses, the broad patterns of supply in the region, and compares the information with that prevailing in selected other major urban centres.

4.2 Inclusion of Courses in the Inventory

The discovery and examination of the current inventory of golf courses in the Lower Mainland was undertaken as part of this study, together with an inventory of the additional courses for which application has been made to either the Agricultural Land Commission or to the local municipalities in a formal sense. This latter phrase is of particular importance; there are many possible golf courses which are under consideration by someone, either the owner of the land or a developer. Some of these proposals have come to the attention of the Study Team, but are not included in the inventory. For the purpose of the Study, the golf facilities and applications that have been described are as follows :-

EXISTING, meaning an existing golf course of various kinds or driving range.

PENDING, meaning a formal application has been made to the ALC, if required, and a municipality, and at December 31st. 1990 not all municipal approval stages had been completed.

APPROVED, meaning a formal application has been made to the ALC, if required, and a municipality, and at December 31st. 1990, the application had received final reading and full approval of a municipality.

DENIED, meaning that at December 31st. 1990, a formal application to the ALC, if required, and a municipality had been made, but approval had been denied by a municipality.

INACTIVE, meaning a formal application has been made to the ALC, if required, and a municipality, and at December 31st. 1990 there had been no further action by the applicant.

PROPOSED, meaning that a proposal has been receieved and has not be approved or denied.

Only applications that have completed the process of municipalities[1] are counted. Those discussed in the report, and detailed in the Appendix "A" include those that have been formally presented to the Agricultural Land Commission or are on other lands and have been fully approved or are in a stage of approval by a municipality.

4.3 Classification by Type and Characteristics

For the purposes of this Study, and in line with generally accepted convention in the golf world, the following classification of courses by type was employed:-

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[1] If a municipality had given approval-in-principal to a course, this was also counted.

- Regulation :- a standard golf course that is approximately 6,000 yards long, with a par of 68 or more. A subset of the regulation course is the tournament quality course which is at least 7,000 yards long.
- Executive/Par 3 :- a shorter course, with par of 54 to 67. These can range in challenge from close to or equal to a regulation course, to something more akin to a pitch and putt. In the US (1985) there were 810 executive courses of which over 100 were supplements to longer courses. This represented 5% of the total which was expected to grow to 10% by 1990. In fact these courses have not caught on as well in Canada with golfers, where they are often viewed as "overgrown pitch and putts"[1]
- Pitch and putt :- essentially a course with a par of 3 per hole - one pitch and two putts. They range around 2000 yards in length for an 18 hole course.
- Driving range :- little definition is required here, these can be either freestanding or in conjunction with a golf course[2]. A more appropriate term, describing both existing and energing facilities, is "golf service centre".

4.4 Definitions by Length and Par

The above definitions are specified in terms of length and par, although they are related also to degree of difficulty and therefore a market segment to whom they appeal. There can be 9 hole and 18 hole courses for each type of course, and this also expands the flexibility with which courses can market - a regulation 9 hole course may appeal to an older clientele than a regulation 18 hole course, and it may attract a more skilled golfer for whom an executive/par 3 or pitch and putt holds little challenge. In the US, 9 hole courses are the small town standard and make up 45% of all courses (1985); in the Study Area they were 23% of existing courses. In many cases the predominance of 18 hole courses marks a sophistication in the development of the supply - some 18 hole courses started life as 9 hole courses. Clearly however, the shorter courses, be they 9 hole or executive/par 3/pitch and putt, appeal to an important segment of the golfing public - the young, the learner and the aging, as well as some women golfers - all segments of the golfing public whose access is likely to be more limited than the traditional frequent male golfer.

4.5 Classification by Ownership and Public Access

Courses can also be classified by ownership and degree of public access. In terms of ownership, the following types exist within the Study Area:

• Public :	A course which has no members and where all players pay as they play. These can be either privately owned or municipal owned
• Private :	Some of the oldest clubs in the Area are owned by their members with no play except for members and their guests

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[1] Alberta Study page 39/40

[2] These are separately specified on the database, although it is possible that they are part of other golf facilities.

• Semi-private	Courses which have members, but also have public play on a pay as you play basis. These are all privately owned, many by the members, and are on privately owned land. the exception of Seymour which is on land leased from the municipality.

4.6 Public Access

The opportunity for the public to play golf varies across the Study Area, based on a number of factors. The first factor is the existence of publicly owned and run courses within the municipality; for these courses, green fees are low since the cost of land is often not factored into the fee, nor is the course seen as a profit-making venture. But not all municipalities run golf courses as part of their provision of recreational services. This is in some cases because opportunities are provided by the private sector, but in other cases it is simply because there is not any opportunity or political desire to develop courses. Either way, the non-provision of municipal courses by some, places greater pressure on those municipalities which do.

4.7 Public Access to Private Clubs

The public provision of golf opportunities through semi-private clubs is the norm across much of the Study Area. However this public access is limited in two significant ways. Firstly, by cost - semi-private courses charge significantly more than public/municipal courses, although their owners would comment that their quality is greater. It is however a problem for those groups in society for whom $20.00 a round is acceptable but $60.00 is not - again the old and the young often fall into this category. Secondly, by time - semi-private clubs reserve peak times for their members, using their pay-as-you-play trade to fill out the rest of the schedule; this is clearly also limiting. The degree to which either or both of these factors might work in the future to further restrict public play is discussed later. Certainly, concerns have been expressed to the Project Team about affordability and accessibility of private and semi-private courses. In agreements made between municipalities and golf course owners, there are frequently clauses to allow public accessibility.

4.8 Classification by Location (Municipality and Sub-region)

The Study Area is extremely diverse when it comes to both population distribution, representing the demand for golf, and the distribution of golf courses, representing the supply. In order to facilitate analysis and understanding of the regional dynamics of the golf industry, the Study Area has been divided into 5 sub-regions. These sub-regions are based on the geography and population characteristics of the Lower Mainland to assist an understanding of the issues relating to the supply and demand of golf courses. The sub-regions are as follows:

Sub-region #1	Urban Core the municipal units of Vancouver, New Westminster, Burnaby, Coquitlam, Port Coquitlam, Port Moody, Richmond and the University Endowment Lands.

Sub-region #2	North Shore/Whistler the municipal units of West Vancouver, North Vancouver (City and District), and the Regional District of Squamish-Lillooet.
Sub-region #3	Valley South the municipal units of Delta, Surrey, Langley (City and Township), and White Rock.
Sub-region #4	Valley North the Regional District of Dewdney-Alouette, including Maple Ridge and Pitt Meadows.
Sub-region #5	Valley Central the Regional Districts of Central Fraser Valley and Fraser Cheam

The current situation regarding the present and possible future supply of golf courses for each of these sub-regions and the Area as a whole is given in the following Table 1.

TABLE 1. CURRENT LOWER MAINLAND SITUATION

	SUB-REGION #1 CORE			SUB-REGION #2 NORTH SHORE/WHISTLER			SUB-REGION #3 VALLEY SOUTH			SUB-REGION #4 VALLEY NORTH			SUB-REGION #5 VALLEY CENTRAL			TOTAL REGION		
GOLF FACILITIES	TOTAL	DISCRETE COURSES		TOTAL	DISCRETE COURSES		TOTAL	DISCRETE COURSES		TOTAL	DISCRETE COURSES		TOTAL	DISCRETE COURSES		TOTAL	DISCRETE COURSES	
EXISTING	32	23		9	8		26	19		7	6		12	10		86	66	
APPROVED	1	1		2	2		5	4		1	0		2	1		11	8	
ALC APPLICATIONS	2	2		1	1		29	27		3	3		13	9		48	42	
NON-ALC APPLICATIONS	0	0		1	1		2	2		0	0		3	2		6	5	
TOTAL	35	26		13	12		62	52		11	9		30	22		151	121	
EXISTING FACILITIES	TOTAL	9 HOLE	18 HOLE	TOTAL	9 HOLE	18 HOLE	TOTAL	9 HOLE	18 HOLE	TOTAL	9 HOLE	18 HOLE	TOTAL	9 HOLE	18 HOLE	TOTAL	9 HOLE	18 HOLE
REGULATION	15	0	15	5	0	5	9	1	8	4	1	3	6	3	4	39	4	35
EXECUTIVE/PAR3	2	1	1	1	1	0	6	1	5	1	1	8	4	0	3	13	4	9
PITCH AND PUTT	6	4	2	2	1	1	5	1	4	1	1	0	0			14	7	7
DRIVING RANGES	9*			1			7			1			2			20		
TOTAL	32			9			27			7			12			86		
PUBLIC ACCESS																		
PUBLIC	17			6			19			6			9			58		
PRIVATE	6			2			0			0			0			8		
TOTAL	23			8			19			6			9			66		
POPULATION/COURSE RATIOS																		
1990 POPULATION	842,530			164,172			345,430			69,494			128,422			1,550,048		
COURSES	23			8			19			6			10			66		
RATIO	36,632			20,522			18,180			11,582			12,482			23,485		
1996 POPULATION	1,000,400			196,088			498,200			106,405			176,553			1,977,646		
COURSES	24			10			23			6			11			74		
RATIO **	41,683			19,608			21,661			17,734			16,050			26,725		

* INCLUDES NORTHLANDS TO DESIGN CONCEPT

** INCLUDES COURSES APPROVED TO DEC 31ST, 1990 ONLY

4.9 The Regional Supply

The region has 86 golf facilities at present, with 11 new facilities approved. In addition there are 48 applications for use of Agricultural Land Reserve land and 6 applications for non-Agricultural Land Reserve land. Of the 86 existing facilities, 38 are regulation courses, 14 executive and 14 pitch and putt courses; 20 are driving ranges. This makes a total of 66 courses, of which 58 allow public access and 8 are private member clubs. Of the approved courses and applications, 8 new courses are approved and the 54 pending applications represent 47 discrete sites for courses[1].

4.10 The Current and Possible 1996 Situation

In reviewing the relationship between supply and demand, the value of the population to course ratio was considered the best measure of the relationship. Population is a basis for measuring demand and data is readily available. The number of golf courses is the measurement of supply and the data is equally available. There is no accurate data on the number of rounds played in the Study Area and where statistics on rounds played have been reported, these figures are disputed because of the absence of a common definition. The annual number of rounds played is also influenced by the inevitable variation in weather conditions, year by year. To complicate this further, there is no data on variations that obviously occur in participation rates across the Lower Mainland. Therefore, the ratio of population to courses is a proxy for the ratio of golfers per course.

These ratios were reviewed for the region and sub-regions, using 1986 and 1996 population data. These ratios are given in Table 1. They include all courses, not just regulation 18 hole courses[2]. The following points can be drawn from this review:

- The current average across the region is 23,485 people per course based on a population of 1,550,048 and 66 courses.
- This ratio varies from 36,632 people per course in the core sub-region to around 12,842 people per course in the valley.
- When approved courses are added to the supply and compared to the 1996 estimates of population, the ratio worsens in all sub-regions except North Shore/Whistler where the additional population and courses are separated by an hour's drive up the Squamish Highway.

4.11 Comparison with Other Areas

It is interesting to compare the supply of courses in the Study Area with the supply in other large urban centres with similar characteristics. The statistics for Calgary, Edmonton and Seattle are given in the following table:

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[1] Some of the applications are for the same parcel of land.

[2] This is to match the definition of 'golfer' used in the demand analysis - anyone who plays at least once per year on anything except miniature golf.

TABLE 2 - GOLF COURSES IN SELECTED LARGE URBAN CENTRES

	POPULATION	POP PER COURSE	TOTAL	PUBLIC	PRIVATE	9 HOLE	18 HOLE	18+ HOLE
CALGARY	671,000	29,174	23	15	8	6	13	4
EDMONTON	785,000	37,381	21	14	7	4	17	0
SEATTLE	2,093,000	42,714	49	31	18	14	30	5
STUDY AREA	1,550,048	30,393	51	43	8	8	43	0
VANCOUVER	1,352,000	32,976	41	33	8	6	36	0

Source: Alberta Study - Page 93
Golf Courses of the Pacific North-West - Page 30

4.12 The Lot of the Golfer in the Study Area

The lot of the public golfer in the Study Area may not be good, but it would definitely seem superior to the public golfer in Seattle. The Study Area has more courses for fewer people, with a smaller number of them being exclusively private. In addition more of them are 18 holes. When the Census Metropolitan Areas for Vancouver, Calgary and Edmonton are compared, Vancouver sits between the other two cities in terms of provision. The other point of note is that the Study Area has considerably fewer truly private courses than the other cities.

4.13 Numerical Assessment of Supply

Hearsay evidence suggests that the supply of courses in the Urban Core Sub-Region is not enough. Stories of full courses abound. Certainly the statistics of use for some municipal courses in Vancouver, 80,000 rounds and beyond, indicate very high demand. While information on rounds played was available for both public and private courses in the Study Area and are reported in Appendix "B", the Project Team considered the data to be statistically unreliable. Nonetheless, the limited supply of courses will become more limited in the future unless additional courses are created. As this happens, golfers will react in two ways - they will travel more and they will play less. In addition the industry will ration tee-off times through higher prices. The current disincentive of crowded courses and inconvenient tee-off times will also be further emphasized.

4.14 Balancing Supply and Demand - the Importance of Travel Time

The relationship between the supply of courses and travel time in the Study Area, and perceptions of golfers regarding travel-to-golf time, are also key to the future growth of the golf industry in the Lower Mainland.

Firstly, various relationships can be stated :

- The greater the commitment of the golfer, the longer the travel time can be to specific golf courses
- The greater the number of rounds played, the closer the golfer will want to live to the normally played course
- The shorter the course, and the shorter the golfing experience, the less time the golfer will be prepared to travel
- Beginner golfers will travel shorter distances than established golfers.

Secondly, various comments were made in the focus group sessions for the Alberta Study regarding travel times which showed the following :

- Frequent golfers wished to have their regular course within 30 minutes, but would be prepared to travel up to one hour for a round at a different course.
- Private club golfers wanted to be closer to their club than public golfers, but, if younger, would be prepared to relocate their residence closer. In fact the cost involved in initiation fees made choice of club a more significant decision than choice of residence. The preferred maximum was 30 minutes.
- Proximity to workplace was as important as proximity to residence - again 30 minutes was the preferred maximum.
- Occasional and average golfers were prepared to travel for longer than either frequent or infrequent golfers. They thought an hour or so not unreasonable.

One finding in the Alberta Study is that frequent Edmonton golfers were prepared to travel farther than frequent Calgary golfers. The significance of this lies in its implied relationship between travel time and shortage of supply - Calgary golfers will not travel as far as Edmonton golfers because they do not have to. Edmonton golfers have to travel over an hour to golf and they will travel for this time. This tends to indicate that there are no absolutes with frequent golfers and that the relationship for the majority of rounds played is largely independent of travel time, within reasonable limits. What these reasonable limits are, only becomes crucial over the one hour travel time noted above. This means that the Lower Mainland frequent golfer will travel to overcome golf course shortages, with proximity to a highway becoming increasingly critical. Travel times for the Greater Vancouver area are reproduced later in the report. These figures show that presently the geographic centre of the region to the outskirts is less than one hour's travel, as it is when travelling on one side of the valley or the other. Times are over one hour when travelling from either Vancouver or the North Shore to either edge of the region, or when crossing from one side of the valley to the other. The impact of these times on the future location of golf courses is as follows :

- It may take over an hour to travel from one side of the valley to the other, but both sides have adequate present and potential scope for courses.
- The municipalities at the geographic centre of the region have good access to anywhere in the region within one hour, so have adequate access to all Study Area courses.
- Vancouver and the North Shore municipalities cannot reach the valley within one hour, but Vancouver residents can reach Surrey/White Rock and

the North East sector, while North Shore residents can reach the Delta area and the North East sector.

4.15 Conclusions

There are two conclusions.

More courses should be developed in the areas close to the urban core, or these golfers will have to get used to travelling longer or golfing less.

The Lower Mainland has 66 courses with 8 approved for development as of December 31, 1990. There is a broader spread of courses across the region than there is population, which is concentrated in the Core Sub-region. While growth in relative terms is more rapid outside the Core, that sub-region will remain a dominant part of the golf demand. This has numerous impacts which will be explored in other chapters of the report.

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

5.0 THE DEMAND FOR GOLF : HISTORICAL PERSPECTIVE

5.0 THE DEMAND FOR GOLF - A HISTORICAL PERSPECTIVE

5.1 Introduction

This chapter looks at the history of golf, both in Canada and elsewhere, and the context that it provides for the future development of golf in the Lower Mainland.

5.2 The Media

Much has been reported in the media in recent years about the demand for golf in the Lower Mainland and the efforts on the part of developers to cater to this demand through increased supply. However the demand for golf is more than simply a number of people who wish to venture onto the golf course. It is the result of a complex inter-relationship of social, demographic and psychological factors and interrelates with many other factors such as the demand for other recreational experiences and a changing view of health and fitness in personal lifestyle. At the same time, the demand for golf is constrained by the existing supply, but it is also molded by the changes that have taken place over recent years in both the sport of golf and the type of facility which is available. The following sections of this report will analyze in turn the changes within the sport of golf, the emergence of and response by the golf industry, and the changing golf facility.

5.3 The Changing Sport - from St Andrews to Sawgrass

The sport of golf is an ancient one. The home of golf is said to be the Royal and Ancient course at St. Andrews in Scotland which has been in existence since the 15th. century. The emergence of golf occurred in the early part of the 20th. century as a sport for gentlemen. The golf course was associated with a golf club and the membership of the club tended to be of an above-average income and socio-economic status. Public golf courses gradually emerged during the 1920s and 1930s and extended the availability of the sport of golf to a wider range of the public. However, it still remained largely a 'gentlemen's sport'. The post-war era brought its own changes. There was a rapid increase in leisure time as the work week reduced in length and recreation became an accepted part of the lifestyle of a much wider range of people. At the same time the concept of recreation still remained very much a leisure pursuit - it was something that was done in people's spare time rather than an important element of a personal lifestyle. The primary vehicle for the delivery of golf remained the golf club with the consequence that golf as a sport remained primarily a male domain.

5.4 Changes since the 1960's

Since the 1960's some of the situation, as described earlier, has changed. The expansion of leisure time slowed and leisure and recreation took on a more fundamental health and lifestyle aspect. One's recreational pursuit became one of the things that defined one as a person and in this regard the prestige of golf was much sought after. The yuppie revolution hit the golf course. There was a consequent increase in the demand for golf and an increase as well in the quality of the experience that was demanded. At the same time the competition for leisure time increased as the sport itself diversified. Sports such as skiing and sailing increased rapidly in demand and many of the older sports, primarily associated with youth participation, became sports which were played by an older population. Thus the most rapid increases during the 1980s in the sport of hockey were in old timers hockey. Clearly, golf now competes in a competitive recreational environment.

5.5 The Industry Response

Over the last ten years sport and recreation have become an industry in their own right. Prior to the 1970s, recreation was primarily a public service provided by municipalities with very few private sector enterprises. One of the few such private sector enterprises which did exist was the private members golf course. However, even this was less an entrepreneurial endeavor and more a social and recreational club. The recognition that the public was prepared to spend large amounts of their disposable income on their recreational experiences, coupled with a much broader recognition that health and lifestyle were important aspects of daily life, brought commerce and entrepreneurship to the leisure and recreation scene[1]. In this regard, the expansion of golf courses and other golf related facilities has been the response to a recognition that people are prepared to spend money for a quality recreational experience.

5.6 Golf and Resort Development

The golf industry has also recognized that there is much to be gained through linking golf courses with real estate and resort development. It can equally be said that the real estate and tourism industries have recognized the benefits of the golf course. This is indeed a very old relationship, which developed in some of the early resort hotels both in Canada and Europe, but the growth in tourism and travel accompanied with the recreation lifestyle aspects outlined above, have developed golf as a major part of tourism. Indeed as the major elements of current tourism marketing are considered, golf plays a significant role in many of them. For instance the convention tourism market is said to be heavily oriented to resorts as preferred destinations, and resorts with quality golf are favoured by convention planners. The business tourist is also courted with golf - both by resort hotels and by the traditional downtown hotels which have established arrangements with local courses.

5.7 The Changing Golf Facility

The golf experience is intimately connected with the golf facility. During the last 20 years there has been a continued diversification in the nature of the golf facility to meet the increasing diversification of player needs. This has seen the emergence of driving ranges and the executive golf course. In more recent times, and for the future, the challenge has been to ensure that all golfers receive the quality of recreational experience that they expect. Achieving this level will be a challenge, and design innovation will be the key to success. Above all, the importance of the quality of the recreational experience that is demanded by golfers must be recognized by the golfing industry in the Lower Mainland, and this must be worked back into both the construction and the maintenance of new and existing golf facilities.

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[1] A 1985 BC Government publication calculated the economic significance as $5b See 'The Economic significance of Recreation in British Columbia' - Ministry of the Provincial Secretary - March 1985.

5.8 General Observations regarding the United Kingdom

As noted, the United Kingdom is the home and origin of golf. Inasmuch as golf and golf courses have been part of the British way of life for five centuries, there are many historical factors which position golfing activities within the milieu of British life, which are unique to Britain and make the development of golf different in that country from the Canadian or North American scene. However, these factors are of interest as we move in the Lower Mainland to consider the development of golf within the context of a highly urbanized and urbanizing environment. The United Kingdom landscape in the 1990s is characterized primarily by a complete interpenetration of urban and rural uses, a situation which will emerge in British Columbia only when the total population is double that which it is now. There are therefore lessons to be learned from the British situation.

Two factors determine this greater interpenetration of rural and urban activities as far as golf is concerned.

The first is the role of golf courses within the rural landscape and lifestyle. Many golf developments in the British Isles have been in conjunction with the conversion of country houses and country estates to other uses. This has set golf courses within the rural areas and within the historic context of landscaped rural development. Thus, while the golf course is seen as neither an urban nor a rural use per se, it does fit within the historic British tradition of landscaping, which has in turn created and maintained that quintessential English countryside.

Secondly, the urban population has always had access to the countryside and agricultural land through a set of footpaths, bridalways, etc. which have brought urban people into much greater contact with the farming community and vice versa. The concept of agricultural land being inaccessible to the urban population is not one which has ever existed in the United Kingdom and therefore agricultural land and farmers have had to exist side by side with an urban population to a much greater extent than has ever been the case in the Lower Mainland of British Columbia.

These historic factors also need to be set side-by-side with the history of planning in the United Kingdom. One of the earliest moves in the United Kingdom in favor of the development of land use planning was the establishment of 'the green belt'. Its purpose was to preserve agricultural land in the rural landscape in much the same way that the Agricultural Land Reserve was established in British Columbia in the 1970s. However, the underlying values of the green belt were to do with the preservation of the rural landscape rather than the preservation of an active agricultural industry. In this sense it referred back to that historic landscape view referred to above. In this context, the golf course was seen as an essential element both existing and as a potential future use within the green belt, and the conversion of agricultural land from agriculture to golf courses has not been opposed and is not prohibited by the greenbelt legislation. Indeed there has been an explicit recognition that the urban fringe, with its competing land uses and escalating development values should be the location for recreational opportunities for the expanding urban population. The British 1975 White Paper on Sport and Recreation[1] noted :-

> *"The Government hopes that in the preparation of .....plans..... authorities will seek to analyse the countryside resources available for use and be prepared to think creatively about their more effective management and about the value of the urban fringe in meeting the expected increase in demand for recreational facilities. In so doing, they will doubtless pay full regard to the need to preserve agricultural land of the higher quality, more particularly where extensive areas are used for recreation."*

In more recent years, and particularly in the the 1980's, the establishment of a large number of golf courses in agricultural areas has been opposed by organizations such as the Council for the Protection of Rural England. However, this is a much more recent phenomenon related to agricultural viability which was not a concern in the immediate postwar era when the green belt legislation and other planning legislation came into being.

The 1980's have brought two other revolutions to the United Kingdom which have changed the situation of golf courses. The first has been the world-wide increase in leisure and tourism which has led to the establishment in the United Kingdom of many new golf courses. The second revolution was that brought by the Conservative government of Margaret Thatcher and has focused on a decreasing emphasis on public actions and public rights and an increased emphasis on private actions and private rights. In the context of the rural environment and the golf industry in the United Kingdom this has re-oriented many people's views about the public right to preserve and reserve land for specific uses such as agriculture, as opposed to the right of the farmer to convert his land to the highest and best use. As these land-owner rights have been more firmly asserted, so the conversion of farmland to golf courses has accelerated.

5.9 The United States

The United States does not have the complex British history of land development but has a much simpler structure where golf is set within three factors:

- The Public-Private delivery factor.
- The Frontier factor.
- The Climate factor.

The United States has over 13,000 golf courses. These have primarily been developed as either private members' courses or as public municipal courses. The golf course has always been an element of civic pride in small town America and the establishment of a small, often 9-hole course on the outskirts of town has characterized the growth of such towns in lifestyle terms. Thus, the vast majority of

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[1] Dept of the Environment (1975) Sport and Recreation - HMSO Cmnd 6200

American golf courses are small, intimate and on the edge of town. There was never any problem developing the small town golf course because there was always an infinite supply of land. In the United States the frontier was never far away and the rights of individuals to develop their land for the highest and best use has always been largely unrestricted by planning constraints. In the last 50 years this has been associated with an ease of travel such that even in more urban areas, the construction of the course well out of town was not an inhibiting factor to its use, either in the short term or the long term. Conflicts of land use around golf course development seldom have arisen. Climate has also played a part in the demand for golf in the United States since in some states the golf season is little more than six month's long. This, together with the tendency of people to relocate to areas with better climates where they can play more golf, has led to a great difference in golf participation rates between states. In states such as California and Florida, where there is a great supply of golf courses and a year round playing environment, participation rates are two and three times that which is found in, for instance, some of the New England states. The climatic factor must be considered when reviewing statistics on golf participation in the United States. So too must the alternatives in competition for sport and recreation activities that exist in particular states. For example, in some of the north-central states, while having a very short playing season, also have a very high participation rate. This is largely related to the predominance and pre-eminence of golf as the sport for persons with a high socio-economic status in these areas.

5.10 Golf Participation in the United States

Statistics on golf participation in the United States come primarily from the National Golf Foundation. For 30 years this organization has been tracking the supply and demand situations for golf and providing data on this to the emerging golf industry. The statistics from the National Golf Foundation will be quoted extensively in this report but it should always be borne in mind that the National Golf Foundation is a promoter of golf rather than an objective statistician. The reservations regarding National Golf Foundation data will be footnoted in this report.

5.11 Canada

As ever, the Canadian situation tends to be a mixture of the North American with other ethnic influences. Much that has been said about the development of golf in the United States can also be applied to the Canadian situation. However, there are some significant variations in the distribution of golf and golf courses across the country as shown in Table 3.

TABLE 3 - GOLFING IN CANADIAN PROVINCES[1]

PROVINCE	COURSES	PARTICIPATION RATE-1976	POPULATION 1986 ('000'S)	GOLFERS 1986	GOLFERS PER COURSE
CANADA	1,797	11%	25,353	2,217,120	1,242
PEI	9	15%	127	15,097	1,677
NOVA SCOTIA	42	7%	873	48,594	1,157
NEW BRUNSWICK	38	6%	710	33,886	892
QUEBEC	230	7%	6,540	363,962	1,582
ONTARIO	800	13%	9,113	941,829	1,177
MANITOBA	93	13%	1,071	110,709	1,190
SASKATCHEWAN	218	14%	1,010	112,435	516
ALBERTA	198	13%	2,375	245,467	1,240
BC	156	15%	2,889	344,513	2,208
NEWFOUNDLAND	9	N/A	568		
NWT/YUKON	4	N/A	N/A		

NOTE: PARTICIPATION RATE IS FOR POPULATION OVER 14 YEARS
THE NUMBER OF GOLFERS HAS BEEN ADJUSTED TO REFLECT THIS

SOURCE: STATISTICS CANADA - 1976
MCLEANS MAGAZINE - APRIL 10, 1989

5.12 Provincial Variations

The Maritimes have both a very low number of golf courses and a very low participation rate, whereas participation and golf course provision in the western provinces is much higher. The British heritage of golf is also shown clearly in the differences between Ontario and Quebec, the latter having a participation rate less than half the former. The British Columbia situation is of the highest participation rate in Canada but of a much higher golfer to golf course ratio than in most other provinces. In many ways this sets the scene for the study currently being undertaken here. There are also differences between the other western provinces, with their high participation rate and large number of courses and British Columbia where the land base is more limited and the climate much more favorable for a longer playing season. These two factors combine to produce the participation rate and golf course supply noted in Table 3.

5.13 The Alberta Study

Alberta is specifically mentioned at this time, since one of the main secondary sources of data available to the study has been the Alberta Leisure Golfing Market Demand Analysis conducted in 1988 for Travel Alberta. The purpose of that study was to determine the characteristics of leisure golfing in Alberta during the 1988 golf season and to develop forecasts of demand for golf through to the year 2025. This extensive study used both questionnaire surveys of golfers and non-golfers and a series of focus groups to determine the characteristics of golfers and the demand for golf in Alberta. In general terms it identified a rapidly expanding demand for golf, a limited supply of golf courses, an interest in continued diversification of courses to meet both a local recreational demand and also an Alberta-based golf tourism demand; it suggested ways in which demand and supply could be best matched through to the year 2025.

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[1] In Table 3, the measure of demand to supply is golfers per course. This is used, since it accounts for variations in participation rates.

5.14 Limitations of the Alberta Study

While the surveys conducted by the study were extensive, they also had significant limitations regarding characteristics of golfers, particularly the amount of play. Certain assumptions had to be made to overcome such limitiations; as a result the forecasting to the year 2025 was inevitably compromised.

5.15 Conclusions

Approximately 15% of British Columbians play some golf. This is among the highest level in Canada or the United States. While the development of golf in the Lower Mainland follows many of the patterns of North America generally, it also shows some similarity to the land limited situations of the United Kingdom and other European countries. In developing responses to this situation it may be desirable to use UK rather than US models.

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6.0 CURRENT DEMAND FOR GOLF IN THE LOWER MAINLAND

6.0 THE CURRENT DEMAND FOR GOLF : LOWER MAINLAND

6.1 Introduction

This chapter looks at the population profile of the Lower Mainland and at the demographic profile of the golfing community. Their interrelations are examined.

6.2 Population Profile of the Lower Mainland

The Study Area is composed of five Regional Districts whose 1986 and 1990 populations were as follows :-

	1986	1990
Central Fraser Valley	70,457	81,346
Dewdney Alouette	69,494	86,227
Fraser Cheam	57,965	66,482
Greater Vancouver	1,332,388	1,477,760
Squamish-Lillooet[1]	19,744	22,055
Total Study Area	1,550,048	1,733,970

Growth has occurred in all parts of the Area, but over the last decade the pace of development and consequent population growth has been greatest in the Fraser Valley communities.

6.3 Study Sub-Regions

For the purposes of this study, the region has been divided into five sub-regions. These were defined on the basis of both geographic identity and continuity, and related patterns of population and housing growth. The dates which have been chosen for projection purposes are 1996 and 2011, with all base data being for 1986. This latter date was selected because it allows use of the last census data, and is a generally accepted base for statistical purposes within the GVRD and elsewhere. The population projections[2] for the study area are summarized below in diagram 3, with the full data given in table 4.

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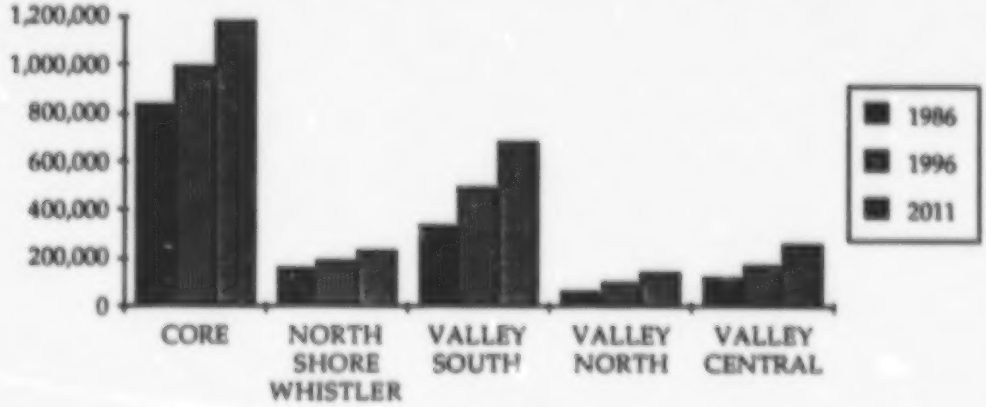
[1] While the Study Area only goes as far as Pemberton, the population of the Squamish-Lillooet Regional District in Electoral Areas A and B and in Lillooet, is so small as to be disregarded for the purposes of this analysis. In addition, if they did want to golf they would likely visit the Whistler courses.

[2] This projection is taken from population projection work done by GVRD Development Services. It is one of a number of projections and is thought by GVRD to be the 'most likely' given present conditions. It was the projection that was used in the document entitled 'Greater Vancouver-Key Facts'. Projections for other Regional Districts were provided by the Ministry of Finance - Planning and Statistics Division.

DIAGRAM 3 - POPULATION GROWTH BY SUB-REGION



SOURCE: PLANNING AND STATISTICS DIVISION, MINISTRY OF FINANCE
-POPULATION FORECASTS TO 2016 BY REGIONAL DISTRICT
-SEPT 1990
GVRD - GREATER VANCOUVER KEY FACTS - JULY 1990

TABLE 4 - POPULATION GROWTH BY SUB-REGION

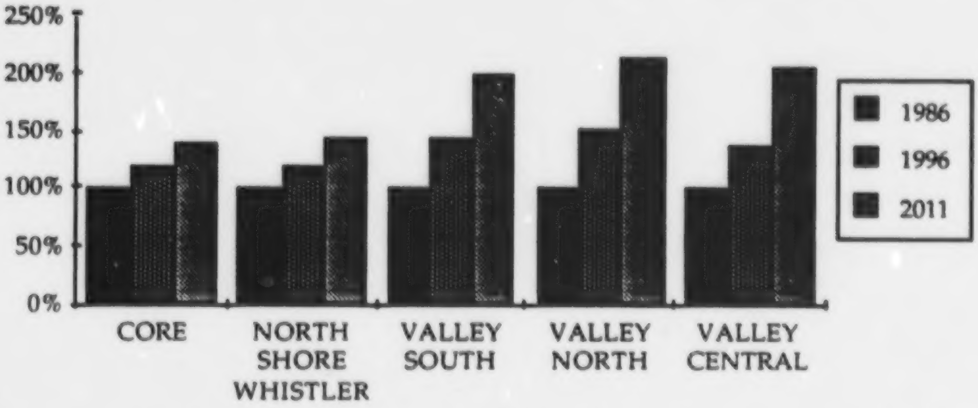
	1986	1996	2011
STUDY AREA TOTAL	1,550,048	1,977,646	2,518,533
SUB-REGION #1 - CORE	842,530	1,000,400	1,181,600
VANCOUVER	431,145	484,900	544,400
NEW WESTMINSTER	39,970	46,300	55,000
BURNABY	145,160	167,300	192,300
COQUITLAM	69,295	99,400	137,200
PORT COQUITLAM	29,115	39,800	53,100
PORT MOODY	15,750	19,700	24,900
RICHMOND	108,490	139,400	171,000
UEL	3,605	3,600	3,700
SUB-REGION #2 - N. SHORE/WHISTLER	164,172	196,088	238,175
WEST VANCOUVER	36,265	40,200	44,000
NORTH VANCOUVER DIST	68,240	83,400	100,800
NORTH VANCOUVER CITY	35,700	40,200	44,800
CT 250	4,223	6,300	9,000
SQUAMISH-LILLOOET	19,744	25,988	39,575
SUB-REGION#3 - VALLEY SOUTH	345,430	498,200	686,300
DELTA	79,610	93,500	112,800
SURREY	181,445	279,500	393,500
LANGLEY CITY	16,555	21,300	27,400
LANGLEY T'SHIP	53,435	85,700	129,400
WHITE ROCK	14,385	18,200	23,200
SUB-REGION#4 - VALLEY NORTH	69,494	106,405	148,488
MAPLE RIDGE	36,025	59,200	85,000
PITT MEADOWS	8,000	10,900	14,300
DEWDNEY-ALOUETTE	25,469	36,305	49,188
SUB-REGION#5 - VALLEY CENTRAL	128,422	176,553	263,970
CENTRAL FRASER VALLEY	70,457	104,401	177,615
FRASER CHEAM	57,965	72,152	86,355

SOURCE: PLANNING AND STATISTICS DIVISION, MINISTRY OF FINANCE
-POPULATION FORECASTS TO 2016 BY REGIONAL DISTRICT
-SEPT 1990
GVRD - GREATER VANCOUVER KEY FACTS - JULY 1990

6.4 Population Growth to 2011

Over the next 25 years the Study Area will grow significantly in population, and the overall growth rates together with the growth rates for each sub-region are shown in diagram 4:

DIAGRAM 4 - POPULATION GROWTH - BY PERCENTAGE



SOURCE: PLANNING AND STATISTICS DIVISION, MINISTRY OF FINANCE
-POPULATION FORECASTS TO 2016 BY REGIONAL DISTRICT
-SEPT 1990
GVRD - GREATER VANCOUVER KEY FACTS - JULY 1990

6.5 Study Area Population Increase

The Study Area will increase in population by 28% by 1996 and by 62% by 2011. This represents a growth of 2.8% per annum over the first 10 years reducing to 2.5% per annum for the latter period. This is largely due to the Urban Core and North Shore sub-regions approaching their development capacity at 1996 or slightly beyond, with growth being increasingly diverted to the Valley sub-regions. The absolute increase in population in the Urban Core sub-region is well over 300,000 people - all of whom will be looking for recreational opportunities of some kind.

The age structure of the population will change over the 25 years noted here. During the last 30 years the birthrate has reduced dramatically, producing an aging population structure for the Study Area[1]. The likely age distribution of the population is shown in Table 5. This has been calculated by using the projected age structure for the GVRD for 1996 and 2011 and applying it to the total population for the study area[2]. The largest growths are in the over 40 age groups - the 'baby boom' of the 1950's is now moving into its middle age! Each of the cohorts between 40 and 64 double in size between now and 2011.

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[1] This situation is similar in all Western countries.

[2] This assumes that the make-up of the other regional districts is similar to that of the GVRD. Given the growth in the suburban municipalities, this seems a reasonable assumption. In addition the other regional districts only comprise 14% of the Study Area population (1986).

TABLE 5 - POPULATION GROWTH - BY AGE COHORT

AGE	1986	%	1996	%	2011	%
TOTAL	1,550,048	100.00%	1,977,646	100.00%	2,518,533	100.00%
0/4	101,827	6.57%	127,840	6.46%	136,366	5.41%
5/14	183,380	11.83%	231,340	11.70%	272,151	10.81%
15/19	105,723	6.82%	114,191	5.77%	149,852	5.95%
20/29	280,970	18.13%	283,772	14.35%	330,511	13.12%
30/39	274,812	17.73%	375,102	18.97%	367,480	14.59%
40/49	189,790	12.24%	314,594	15.91%	413,749	16.43%
50/59	154,018	9.94%	203,929	10.31%	373,874	14.84%
60/64	72,213	4.66%	79,047	4.00%	146,945	5.83%
65+	187,315	12.08%	247,831	12.53%	327,605	13.01%
TOTAL 5+	1,448,221	93.43%	1,849,806	93.54%	2,382,167	94.59%

SOURCE: GREATER VANCOUVER - KEY FACTS
- GVRD DEVELOPMENT SERVICES - JULY 1990

6.6 Precision of Age Shifts

It is interesting to note the precision with which these age shifts can be projected, even to the year 2011. The majority of the people included here have already been born, and the projection process ages the population and adjusts for births and deaths. The only unknown factor is the net migration level and studies have shown that this mirrors quite closely the age structure of the population[1].

6.7 Demographic Profile of Golfers

The picture of the average golfer has been well documented both in the studies by the National Golf Foundation and by the recent study of golfing in Alberta. In general terms that average golfer is :-

Male,
From a white collar profession,
With above average household income and
With an above average level of education.

However for the purposes of projecting the future demand for golf, a much clearer statistical picture of the golfing population and its relation to the total population must be made. The best way of obtaining this picture would be to conduct an in-depth survey of the golfing habits of a statistically valid sample of residents of the Study Area[2]. This was however beyond the scope of this study.

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[1] Current Demographic Analysis - Cat 91-209E - Statistics Canada - 1990

[2] Even this process is not without its perils. The Alberta Study asked a series of questions about the frequency of golfing, only to discover that the sum of the results were well beyond either the recorded rounds at local golf courses, or even the capacity of those courses. The consequent

Therefore the profiles of golfers prepared by other studies must be analyzed and assumptions made about the situation in the Lower Mainland. In making these projections, every attempt has been made to ensure that the assumptions on which they are based are clearly stated.

6.8 Total Participation

Participation rates are expressed as a percentage and reflect the proportion of the population that are engaged in a particular activity. The first important variable to consider is the population of which participants are a proportion; the second variable of importance is what condition determines entry into the participating group. In Table 2, the participation rates for golf in Canadian provinces is given. The source of this data is a 1976 survey by Statistics Canada, and the participation rate is expressed as a percentage of those aged 14 years or over. This seems a reasonable age limit; the participation of those under age 14 years is probably minimal. The British Columbia rate was 15% with one round per year as the entry criteria. In the data collected for the National Golf Foundation (NGF), the population was those 5 years and over, and the entry criteria was anyone who had played one round of golf in the previous calendar year[1]. Data from the NGF does not cover Canadian Provinces. The following is NGF data for sample of areas in the United States of America :-

• Total USA	10.4%
• Western States	10.2%
• Washington	11.0%
• Oregon	10.7%

The Alberta Study[2] indicated that 29.4% of Albertans over age 12 had golfed at least once in the year of 1988. This seems to be at odds with both the 1976 Canadian data and the National Golf Foundation data[3]. The Alberta Study recognizes that some of its data is unreliably high, and it would seem that this is in part of the problem. In addition, the use of age 5 by the National Golf Foundation studies does depress those rates, although only by 2% or 3% at most.

6.9 Assumptions for this Study

For the purposes of this study, it will be assumed that the current participation rate in the Lower Mainland is 11% of the population over age 5, using the once per year entry criteria. This is the same as for Washington State. It does however represent a 2.6% decline from the 1976 Statistics Canada estimate in

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caveats introduced into their study findings leave their projections in almost as much doubt as if they had not conducted the survey. However the studies conducted by the National Golf Foundation in the US have not been compared at all in this way so there the concern is not that they are known to be wrong so much as that this correlation is simply not known.

[1] The only exclusion from the survey was in the line "Please do no include golf played on miniature golf courses in your answers." It would certainly have altered the participation rate for the 5/12 age group!

[2] page 85

[3] The highest US state participation is 15.9% for Minnesota and Wisconsin.

equivalent age terms. This is thought to be a reflection of the increased difficulty that potential golfers have finding golfing opportunities - they would tend to move to other recreational pursuits.

6.10 Distribution of Golfers by Sex

Most golfers are men, but this situation seems to be changing. Using the National Golf Foundation data the situation for the percentage of golfers who are women is as follows :-

• Total US	22.4%
• Western States	23.8%
• Washington	20.1%
• Oregon	27.8%

In Alberta, 27% of golfers were female.

However all studies indicate that more women are starting to golf; according to the National Golf Foundation studies, 41.1% of beginning golfers were women, with this percentage having increased every year since 1985. In Alberta, 50% of women golfers had started golfing within the last four years, as opposed to 33% for the sample as a whole[1].

6.11 Women and Golf

This increasing number of women golfers is to be expected. The participation of women in physical activity programs has increased dramatically over the last decade. It is particularly marked in the 20 to 39 age group. Women's search for alternative recreational activities would, particularly as they get older, attract them to the golf course. Women have fewer children and tend to be in white collar employment. In other words, this could be the description of the average golfer. All these factors are expected to continue and increase over future years and thus female participation in golf is expected to increase.

6.12 Age Structure

The main complicating factor in assessing age structure differences between different groups of golfers is that different age groupings are used in each study. However, when corrections are made for the age structures of the golfing populations of the US and Alberta, their profiles are very similar. This is true both of their similarity to each other, and to their similarity with the populations from which they are drawn. In the case of the Alberta profile, the general Alberta population is skewed toward younger age groups than the US population.

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[1] Alberta Study, page 30.

6.13 Age Structure in British Columbia

No data is available on the age distribution of Lower Mainland golfers. The figures below are based on National Golf Foundation data and used in this Study for projection purposes :-

5/14 years	2.8%
15/19	8.4%
20/29	14.8%
30/39	12.4%
40/49	11.5%
50/59	13.2%
60/64	14.5%
65+	11.0%

For projection purposes, the application of these figures yields a slightly different figure from the application of a total participation rate of 11%. However the differences are minimal, given the overall context of the study.

6.14 Changing Age Structures

The impact of changing age structures on the demand for various recreational activities in Canada was the subject of a recent article in Recreation Canada[1] by David Foot. He used the data from the 1965 and 1982 US National Recreation Surveys, together with Statistics Canada population projections to project the rate of growth of 23 recreational activities, based only on changes in the total population and its assumed age structure. Of the 23 activities, golf placed 9th, being the fastest recreational sport growth rate, and behind only the passive activities such as birdwatching and picnicing.

6.15 Frequency of Play

The participation rate assesses whether a person does or does not play golf and this is a most difficult assessment to make as noted above with the Alberta Study. More complex still is assessing how many rounds are played by each golfer - obviously a critical variable in assessing total demand. The National Golf Foundation studies have established that the median number of rounds played is 8 per annum, and have categorized golfers around this figure as follows :-

• Infrequent golfers	1 to 2 rounds per year
• Occasional golfers	3 to 7 rounds per year
• Average golfers	8 to 24 rounds per year
• Frequent golfers	25+ rounds per year

Since this same schema was used in the Alberta Study, comparisons can be made as per Table 6 on the following page :-

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[1] Foot, David K.,(1990) The Age of Outdoor Recreation in Canada - Recreation Canada, December 1990, pages 16/22.

TABLE 6 - FREQUENCY OF PLAY

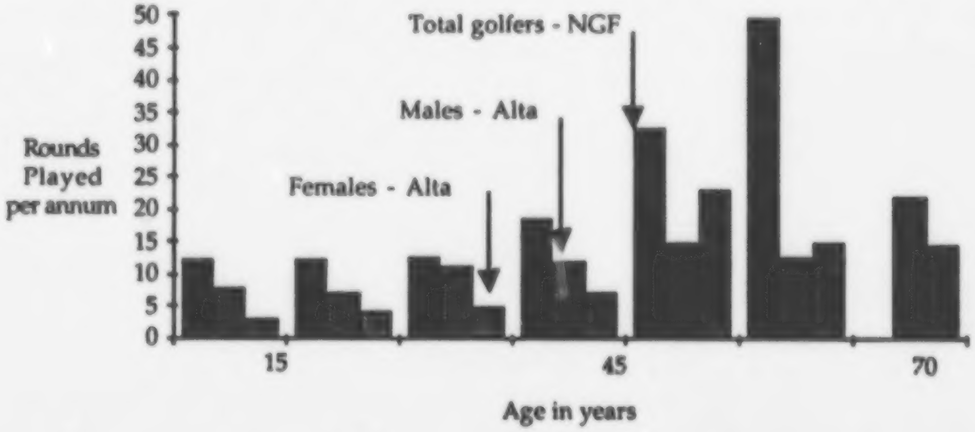
	US	ALBERTA	EDMONTON	CALGARY
INFREQUENT	20.20%	18.20%	20.00%	16.00%
OCCASIONAL	29.80%	26.40%	27.90%	29.10%
AVERAGE	26.00%	30.10%	30.90%	32.60%
FREQUENT	24.00%	25.30%	21.10%	22.30%
TOTAL	100.00%	100.00%	100.00%	100.00%
AVERAGE ROUNDS	20.8	20		
MEDIAN ROUNDS	8	10	9	10

SOURCE: NATIONAL GOLF FOUNDATION -1989
ALBERTA STUDY

6.16 Comparisons between National Golf Foundation and Alberta

While both the studies by the National Golf Foundation and the study in Alberta found the average was approximately 20 rounds per year, the Alberta Study suggested that this was too high when compared to the total potential rounds available at Alberta courses, and the records of rounds played from those courses. No data has been collected by this study which will verify the average for the Study Area, although calculations would support the belief that the average is high and could be close to if not over 20 rounds per annum. No evidence is presented by either study to show that the median would be different in British Columbia from either of these studies.What can be said however is that rounds played increase with age as shown in diagram 5, and that with an aging population it can be expected that the number of rounds played will increase, even if the total population was static.

Diagram 5 - Rounds Played by Age



Source: National Golf Foundation (1989) : Alberta Study (1988)

The Alberta Study shows the data, on the previous page, to be true of all golfers, while the National Golf Foundation studies shows that it is true only of frequent golfers - infrequent and occasional golfers play less as they age; but that the reduction of rounds due to them playing less is far outweighed by the increase in rounds due to the frequent golfers playing more[1].

6.17 Conclusions

The population of the Lower Mainland will grow by over 1 million people by 2011, with the older age cohorts growing fastest. The profile of golfers emphasizes the elements of the population profile which are growing fastest, thus leading to the assumption that golf will grow faster than the average rate of population growth.

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[1] The relationship between frequency of play and rounds played is as follows:

	Golfers as %	Total rounds played
Frequent	24.0	75.8
Occasional	26.0	16.8
Average	29.5	6.0
Infrequent	20.2	1.4

Source: National Golf Foundation page 20

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

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7.0 PROJECTING THE DEMAND FOR GOLF

7.00 PROJECTING THE FUTURE DEMAND FOR GOLF

7.1 Introduction

In making projections of golf demand, three kinds of demand will be considered separately. The first is the demand from the resident recreational golfer; the second is the demand for golf from tourists to the Study Area, both those from British Columbia and those from other parts of the province, country and other countries; and the third is the demand for tournament golf.

7.2 Recreational Golf Demand

It is difficult to know precisely who is playing golf now - projecting 25 years into the future is guessing - the skill is in making those guesses as informed as possible. In order to do this, a number of separate projections of the recreational demand have been made. At the end of this section, their individual results will be compared, and combined in such a way that they can be used to compare with the assessment of current and likely future supply.

The first of the methods focuses on the changes in demography which the Lower Mainland will undergo due to increasing population with greater proportions of older people. It also looks at the increasing number of women who are likely to be playing golf over the next 25 years and the impact that this will have on the overall participation rates.

The second method continues this analysis and examines the impact that the aging population will have on the number of rounds played.

The other two methods look at projections done by other studies, and the likelihood of their results applying to the Lower Mainland. Once this analysis has been made, these estimates can be compared to the supply of courses with the population to course ratios, described earlier in the Study.

Finally the projections made by each method are expressed as per annum growth, and a set of figures considered to be the most likely growth rate determined.

7.3 Method #1 - The Demographic Variables Approach

Three demographic factors will impact the current number of golfers and cause it to increase:

- the increase in the total population; clearly if the population increases by 28% to 1996 and 62% by 2011, and assuming the participation rate is unchanged, the number of golfers will increase by the roughly the same amount.
- the increased play by women; at present about 1 in 4 players are women, and it is assumed that this will increase to 1 in 3 by 1996, and to 2 in 5 by 2011.
- the changing age structure of the population; this factor is covered in more detail below.

In addition an increased supply of courses will allow more people to play. Some of these will be women as noted above, but the number of men will also increase. The impact of all these factors on the participation rate is summarized in Table 7, on the following page :-

TABLE 7 - PROJECTED PARTICIPATION RATES BY SEX

	MALE	FEMALE	TOTAL
1986	16.60	5.40	11.00
1996	17.60	8.80	13.20
2011	18.60	12.40	15.50

The impact of the aging population on the number of golfers is shown in Table 8 :-

TABLE 8 - PROJECTION OF GOLFERS TO 1996 AND 2011 - STUDY AREA BASED ON CHANGING DEMOGRAPHIC STRUCTURE

Note :
Unlike the data in Table 7, the Participation Rate in Table 8 does not change over time.

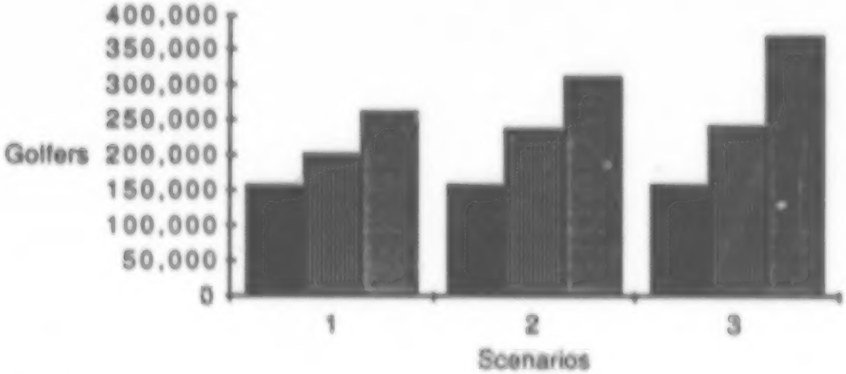
	PARTICIPATION RATE	TOTAL POPULATION			TOTAL GOLFERS		
		1986	1996	2011	1986	1996	2011
5/14	2.80%	183,380	231,340	272,151	5,135	6,478	7,620
15/19	8.40%	105,723	114,191	149,852	8,881	9,592	12,588
20/29	14.80%	280,970	283,772	330,511	41,584	41,998	48,916
30/39	12.40%	274,812	375,102	367,480	34,077	46,513	45,567
40/49	11.50%	189,790	314,594	413,749	21,826	36,178	47,581
50/59	13.20%	154,018	203,929	373,874	20,330	26,919	49,351
60/64	14.50%	72,213	79,047	146,945	10,471	11,462	21,307
65+	11.00%	187,315	247,831	327,605	20,605	27,261	36,037
TOTAL					162,907	206,401	268,967
						127%	165%

SOURCE: CALCULATED FROM
GREATER VANCOUVER KEY FACTS
- GVRD DEVELOPMENT SERVICES - JULY 1990

The aging of the population has very little effect on the growth in the numbers of golfers, and indeed causes the number to fall below the growth in the total population at 1996. However the above table shows also that the number of golfers aged over 40 years as a percentage of all golfers, increases from 45% in 1986 to 57% in 2011 - and as discussed earlier, it is in these later age cohorts that the average number of rounds played increases. This further addition to the golf demand will be discussed in the next section.

It is necessary to review the impact that the potential increases in the total participation rates as noted in table 7 above might have on the total number of golfers. This assessment is presented in diagram 6, as follows :-

DIAGRAM 6 - PROJECTION OF GOLFERS BASED ON INCREASING TOTAL PARTICIPATION RATES
1986 /1996/2011



Scenario #1	No increase in participation rates - growth matches overall population growth rate
Scenario #2	As scenario #1, but growth in participation rate from 11.0% to 13.2% by 2011
Scenario #3	As scenario #2 but increase in participation rate to 13.2% by 1996 and 15.5% by 2011

7.4 Method #2 - Rounds Played

The second method builds on the first by using the projected number of golfers and some assumptions about the number of rounds played, to project the total number of rounds which can be assumed will be played in the Study Area at each of the projection dates.

An assessment was made by the Project Team of the impact that the changing age structure in the Study Area as shown in table 8, would have on rounds played. This showed that for any group of 1000 golfers, the change in age structure would increase the number of rounds they played by 2.68% in 1996, but by 11.74% in 2011. These increases were then applied to the base assumption of rounds played (an average figure of 18 rounds was used[1]), and then the result was applied to the increased number of golfers from method#1. The results of this analysis were to project a further increase in golf demand over the levels shown in Diagram 6. This analysis is shown in Diagram 7 :

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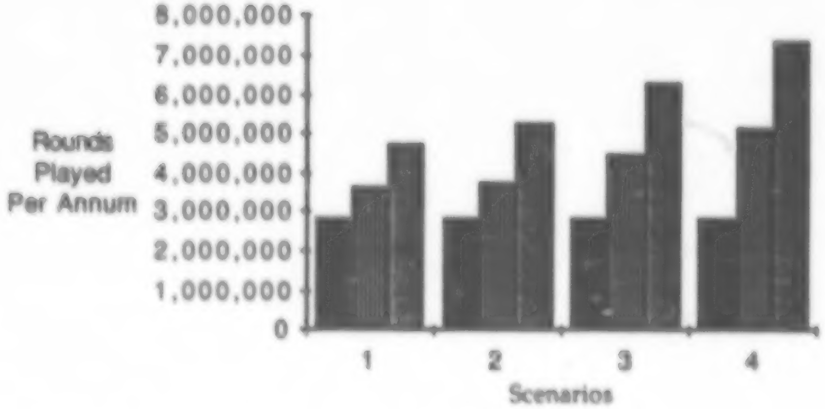
[1] Since the projections are worked back into per annum rates of increase, the base on which these calculations are made is not important at this point).

DIAGRAM 7 - PROJECTION OF MAXIMUM ROUNDS PLAYED
1986/1996/2011



Scenario #1	No increase in participation rates - growth matches overall population growth rate only
Scenario #2	As scenario #1, but median rounds played increases with aging population
Scenario #3	As scenario #1, but growth in participation rate from 11.0% to 13.2% by 2011 - median rounds played increases with aging population
Scenario #4	As scenario #1 but increase in participation rate to 15.5% by 2011 - median rounds played increases with aging population

Using the present participation rate, the base number of rounds for 1986 is assumed to have been 2,867,500. Population growth would increase this by 28% while the impact of changing age structure would increase this a further 3% to 31%. If the impact of the increasing total participation rate is added, the increase is 57%. This would be 4,512,336 rounds of play. A similar analysis for 2011 shows rounds increasing to over 7,512,000 for a 161% increase over 1986.

7.5 Method #3 - Report on Golfcorp Ventures Inc. - Market Needs Analysis

In 1989, Golfcorp Ventures Inc. commissioned Pannell Kerr Forster to make a Market Needs Analysis for high quality, semi-private golf course development throughout Canada; the study included Greater Vancouver, and looked at the current supply of private and semi-private courses, the additions to this supply, and at the demand for the product.

Their assessment of demand growth was as follows:

"A five percent annual increase in demand is projected for both semi-private and private markets beginning in 1989. These rates are considered to be conservative in light of strong economic and residential growth which is projected for the surrounding market area and the expectation that the number of golfers in Canada will double in the next 10 years. With the strong residential growth occurring in Greater Vancouver, as well as the continued increase in golf

participation, it is likely that growth in demand for golf will exceed the five percent per annum projected here."[1]

Their base year was 1989 and projections were made through to 1996. These situations are given in Table 9 and were as follows:

TABLE 9 - GOLFCORP VENTURES INC.
DEMAND PROJECTIONS TO 1996

		1989	1996
MEMBERS		14,121	19,870
ROUNDS			
	MEMBERS	630,895	887,733
	P.A.Y.P.	275,150	387,163
	TOURNAMENT	118,113	166,197
	TOTAL	1,024,157	1,441,092
	% GROWTH	5%	5%

SOURCE: MARKET NEEDS ANALYSIS - GOLF COURSE DEVELOPMENT
- PREPARED BY PANNELL KERR FORSTER FOR
GOLFCORP VENTURES INC.
- VOL.2, EXHIBIT 1-6
- DEC 1989

7.6 Method #4 - Washington Outdoors - Recreational Demand Assessment

The State of Washington has also been looking at the increasing demand for golf as part of an assessment of and policy plan for outdoor recreation in all areas of the state for 1990 through 1995[2]. The assessment of outdoor recreation demand was extensive and statistically rigorous. It included a Recreation Demand Model and a telephone and mail-back survey of 1,885 households. Projections were made for 57 activities, within four regions of the state. Region 2 included the Greater Seattle area being the Counties of King, Pierce, Kitsap and Snohomish. The demographic and socio-economic assumptions on which the models operated were the most conservative that could be made, and were different from this Study of the Lower Mainland in several respects[3].

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[1] PKF page 17. This statement is repeated for each of the nine urban markets analysed, with the alteration only of the word 'Vancouver'.

[2] Washington Outdoors: Assessment and Policy Plan 1990-1995 - Interagency Committee for Outdoor Recreation - April 1990

[3] In particular the assumption was made that "activities are 'mature'- neither growing or declining in popularity". This is at variance with the comments about women's increasing participation in golf, a factor which has added 15% to this study's demand for golf.

The following is a summary of the findings for Region 2 and the State as a whole :-

	State Total	Region 2
Golf trip demand - 1987	3,144,000	1,757,000
Golf trip demand - 2000	4,146,000	2,468,000
Percent growth	32%	40%
Percent growth per annum	2.46%	3.08%
Activities assessed	57	53
Golf's ranking	24th	9th

In the state as a whole therefore, this growth rate is average for the activities surveyed. It was however the fastest growing sport/game except for jogging/running. In the Seattle region, the golf demand was significantly higher, and its growth rate was faster than every other active recreation activity except for downhill skiing, bicycling on the road for less than a day and jogging/running.

7.7 Summary of Recreational Golf Demand

Behind the demand projections shown, there has been considerable research to build up a demand methodology unique to this study. The salient points are as follows :-

- Based on growth in population alone, the number of golfers will increase by 2.8% each year to 1996 and 2.5% each year from 1996 to 2011
- An increasing propensity to play golf among women, when combined with slight increases in the availability of courses, will contribute to increases in the overall participation rate for golf to 13.2% by 1996 and to 15.5% by 2011. This is still lower than the current participation rate in some US states with similar or worse climates than British Columbia. This growth will cause the number of golfers to increase by 5.3% each year to 1996, and by 5.3% each year from 1996 to 2011.
- The main impact of the changing age structure is to increase the number of golfers in the over 40 years age group. These groups play more rounds of golf than do younger players. This will further increase the growth rate of demand for golf when measured in terms of rounds played. This demand will increase at 5.7% per annum through to 1996 and at 6.8% from 1996 to 2011. As can be seen the impact of this aspect of demand growth does not become strong until after 1996, and will continue past 2011.
- This is in contrast to a study prepared by Pannell, Kerr, Forster for Golfcorp Ventures Inc., which projected a 5% per annum growth rate through to 1996 for private and semi-private clubs.
- The study in Washington State projected a growth rate for the Seattle area of 3.08% per annum, which is the anticipated rate of population growth.
- Also as a comparison, using the National Golf Foundation rule of thumb, an increase of 18 new courses by 1996 and 42 courses by 2011 was projected.

7.8 The "Golf Boom"

This section cannot be concluded without a comment on the scepticism about the "golf boom" reported recently in the press and magazines[1]. It is reported that many courses in the US have not reached a level of economic viability sufficiently rapidly to survive although many are still operating under new owners. Most of these developments were built as an adjunct to real estate developments, many in relatively isolated areas; they found that they could not draw enough players to cover their fixed costs. This was particularly true of private member clubs, courses developed as part of resorts or daily fee courses. Those that had carefully researched their markets, have survived. This is less, therefore, a comment on the overall level of demand and its growth, and more a question of the inevitable volatility of the real estate development business. It does however caution us in the Lower Mainland to make careful and conservative plans for this type of development.

7.9 Conclusion

While several different methods were reviewed for projecting recreational golf demand, no one stood out as producing numbers which had any greater validity than any other method. However they all projected a considerable growth rate for golf, beyond the rate at which the population overall is growing.

A 4% per annum increase in golf over the next 25 years seems quite conservative when the base of overall population growth is considered. There will essentially be a doubling in demand for golf by 2011, and a 40% increase by 1996. Thus the projections for recreational golf demand on which the rest of this Study is based are as follows :-

	Population	Golfers	Rounds
1986	1,550,000	160,000	2,850,000
1996	1,975,000	223,000	4,000,000
2011	2,518,000	318,000	6,000,000

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[1] Extrapolation Madness - Forbes - December 24, 1990 - page 56/61.

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

8.0 TOURISM DEMAND

8.0 TOURISM DEMAND

8.1 Introduction and Tourism Golf Demand

Tourism is one of the demands made on Lower Mainland golf courses. The demand from tourism is also not met. Marriot Hotels, one of the largest developers and managers of hotels and resort/convention facilities, claim that 95% of their resort/convention business is driven by golf. In British Columbia, the second largest industry is tourism. There are world class resort facilities within a 2 hour drive of downtown Vancouver. It is believed that no resort courses in the Lower Mainland will accept pre-bookings from incoming players. The income from tourist revenues creates an opportunity to build a golf industry that is world-class.

In March 1988, the Ministry of Tourism published a report entitled 'Golf Tourism in British Columbia - A Product and Market Review". Its findings were as follows :

- The golf tourism market is large, attractive, easy to reach and identify, and expanding.
- There is interest from these markets in British Columbia as a golf tourism destination.
- The best known and most attractive courses to tourists were the private clubs, which were also virtually inaccessible to golf tourists.
- British Columbia had very few courses which were part of resort developments, and few that were involved with packaged golf tours.
- The markets could be categorized as having three segments - the ardent recreational golfer, the casual recreational golfer and the corporate/executive golfer. The needs of each regarding course type preference, accommodation and length of stay were similar but distinct.
- The major geographic markets are British Columbia, Alberta and Saskatchewan, Washington and Oregon, California, Japan and Eastern Canada/US.
- The market segment with the greatest long-term potential is the ardent recreational golfer from Alberta, Washington, Oregon, California and Japan. This group, regardless of origin are seeking challenging and well-known courses and quality accommodations; they are prepared to pay relatively high prices for this experience, which could be outside of the Study Area[1].
- The major strengths of British Columbia were seen to be its lack of congestion on the course, its dollar value, the scenery and the fact that it is 'undiscovered'. The major weakness was seen to be the lack of resort hotels and accessible top quality courses.

Since that time the Ministry of Tourism has been active in the formation of a golf industry association and in providing assistance to the regional tourist associations to assist them with product marketing. They have also concluded with the PGA an agreement to designate British Columbia as an official PGA destination (October 20th. 1989).

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[1] Also the market segment identified in the Alberta Study (page 113).

8.2 Strategy of the Ministry of Tourism

The Ministry is developing a strategy which will involve the following :

- Improved market research to be conducted in the summer of 1991.
- Strategies for four regions - the Lower Mainland, Lower Vancouver Island, the Okanagan, and the Kootenays.
- One or two major resorts located in each region (two in Lower Mainland). These resorts would have 27 or 36 holes of top quality golf, a major hotel, and be within 1 hour of the downtown or major airport. They would be built on 4/500 acres and would be additions to the current stock, rather than changes to existing hotels or courses.
- A tournament quality, championship golf course located in the Lower Mainland. This may be associated with a resort but would need some associated activity to carry the $20 million+ construction cost. It would need to be a signature course. It would require 1000 acres. It may be on Crown land. It may be developed as a Tournament Players Club of the PGA Tour.

8.3 The Alberta Study and Tourism

The Alberta study noted earlier also looked at the demand for golf by tourists, both Alberta residents and those from other provinces and countries. It covered much of the same ground as the British Columbia study and many of its findings were the same or similar. It did however also conduct a series of focus groups with golfers about their perceptions regarding golf tourism. In certain respects, these findings contradict some of those noted above viz-a-viz the type of resort that golfers seek. The difference was not in the golf course - '1 or 2 challenging 18 hole regulation courses, maintained to the highest standards'[1] was still the norm, but a much more modest and moderately priced hotel was the preferred model. These golfers would prefer to spend their money on golfing rather than the resort.

8.4 British Columbia Tourist Data

Data on the size or potential of the tourism golf market are virtually non-available. The executive summary of the British Columbia study comments that 3,800,000 rounds of golf were played in British Columbia in 1987, and 500,000 were by people playing away from their home course - but this is not validated elsewhere in the report. The Alberta Study discussed golf packages with its focus groups, but did not try to relate any of these findings to other data - and the reliability of this focus group data has been previously discussed.

8.5 Supply creates Demand

What is probably true is that supply will create its own demand : that is to say that if the facilities are provided which allow tour operators to arrange tours, then people will come to British Columbia and the Lower Mainland for golf holidays. And those who are here for other reasons, personal or business, will play a round or two while they are here. At the present time, the University Golf Course has an arrangement with several downtown hotels to make tee times available for hotel guests who wish to play - and this arrangement is most successful.

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[1] page 63

8.6 Tourist Facilities

As to what facilities are required, the earlier statement from the Ministry of Tourism regarding their strategy is probably as accurate as anything, as it was developed in conjunction with the South West Regional Tourist Association. This strategy calls for the establishment of a Tournament quality course, together with one or two other resort courses of 27 or 36 holes. In addition, there is a need for 3 or 4 other high quality courses which could be used as 'satellites' for those on longer tours or second visits who wished to play other courses; some existing courses could meet this need - the University Golf Club would be one.

8.7 The Links

Clearly there is a linkage between the needs and aspirations of the more advanced local golfers and the needs of ardent recreational golfers who are tourists. Both could use courses such a described here, and the data from Alberta shows that such challenging courses as these, when coupled with the right accommodation, and when open to the public, would be in high demand.

8.8 The Ministry of Tourism and the PGA Tour

The Ministry of Tourism has an agreement with the PGA Tour designating British Columbia as an official Destination; this allows the Province to use the PGA logo in its golf marketing - a logo which has become the "seal of approval" for golf, (along with the "signature course"). The Tour also develops its own courses within certain of its destinations, courses which are always associated with resorts - these are the Tournament Players Clubs. If such a course were developed in the Lower Mainland it could become the home of the Canadian Professional Golfers Association (CPGA). This organization is currently based in Ontario, but somewhat homeless. It is known to favour a move to the province with the longest playing season, as long as there is an adequate facility. The Association would establish both its headquarters and a Golf School. The tournaments which could be attracted to this course are:

- Possibly a PGA Tour event.
- PGA Senior Tour event.
- An LPGA event (the duMaurier Classic has been held here in past years and is scheduled for 1991).
- A made-for-TV event from the PGA.
- Various B. C. amateur events organized through the BCGA and CPGA - B.C. Section.
- A CPGA event.

The number of rounds that these events would contribute would be insignificant in relation to the impetus that they would provide for golf development in the area.

8.9 Conclusions

The demand for golf by tourists could become more and more important and many agencies would like to promote this aspect of tourism. However it is entirely dependent on creating a series of courses which could accommodate this aspect of the demand.

The demand side is clearly influenced by tourism marketing strategies and perceptions of recreational opportunity from potential visitors to the region. As the major elements of current tourism marketing are considered, golf plays a significant role in many of them. This is seen in the format of development agreements in the Resort Municipality of Whistler. The agreements are tailored to suit the tourist requirements with due regard for the use of the course by the community.

The demand for golf from tourism is not met in the Study Area and there is competition from other B. C. regions, mainly the Okanagan. In British Columbia, the second largest industry is tourism. There are world class resort facilities within a 2 hour drive of downtown Vancouver. It is believed that no resort courses in the Lower Mainland will accept pre-bookings from incoming players. The income from tourist revenues creates an opportunity to build a golf industry that is world-class.

The Project Team is not in any better position than the Ministry of Tourism to project demand. The strategy of the Ministry is to establish a Tournament quality course, together with one or two other resort courses of 27 or 36 holes. In addition, there is a need for 3 or 4 other high quality courses which could be used as 'satellites' for those on longer tours or second visits who wished to play other courses; some existing courses could meet this need.

With the above assessment in mind, 5 additional courses are needed to meet tourism demand, which should be constructed by 1996, for a 1996 total of 90 courses. After 1996, an additional 5 courses to meet tourism demand can be anticipated, bringing the total number of courses to 119 by 2011. The establishment of these courses will also meet the demand for tournament golf.

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

9.0 FINANCIAL MATTERS, MANAGEMENT, PLANNING PROCESS

9.0 FINANCIAL MATTERS, MANAGEMENT, AND PLANNING PROCESSES

9.1 Introduction

This chapter describes the golfing industry in the Study Area from a financial perspective. It provides a general understanding of how privately owned courses are financed and operated. Publicly operated courses are also described.

9.2 A Fragmented Recreational Industry

The golfing industry is fragmented so there is difficulty in assessing its economic viability in the Study Area. Each course has to be evaluated separately. The industry is made up of a diversity of clubs and courses, with varying circumstances in which the facilities were created and equally varying reporting techniques. There is no way of assessing the quality of record keeping. Some courses are reluctant to make a report and regard the information as confidential. The information base is therefore suspect and the industry agrees it is suspect. The industry would benefit from some sort of provincial institution that is committed to improving and standardizing development and management practices.

9.3 Golfing, Bay Street and an Approval Process

In the past, the capital cost of a new golf course has been easily financed by a small group of private investors, usually the club membership. In Canada, some courses were subsidized by municipalities or occasionally by associated residential development. Today's land costs now place the cost of development well beyond the capability of the small investor. The golfing industry in British Columbia is not yet sufficiently developed or the funding demand sufficient to be attractive to Canadian financial institutions. Canadian investors look at golf course development as a short term investment, while foreign investors see it as a long term investment. Golf course financing has not been viewed by the capital market as an opportunity or a problem, but the capital amounts exceed those which can be secured from existing conventional fund raising sources. This may change as new facilities of substance are developed and facility development and management skills are enhanced.

9.4 A Common Land Use Approval Process

A common land use approval process with a clear indication of what is expected from the proponent would also help the financing mechanism. Golfcorp Ventures Inc, as a representative developer, in responding to requests to meet the requirements of a municipality find the list grows and grows in concert with the approval process. Some of the items requested have capital costs outside of the site development. There is a need to encourage carefully considered and professionally prepared submissions by developers. It should be added that during the recent months, planning staff in offices dealing with a high number of applications have become more aware of the implications of golf course development and the requirements to be put before developers.

What is required by the developer is some degree of predictability to the process, if that is possible. This does not imply a tacit approval of the submission but the need for a clear indication of what is expected from the applicant and how the application will be processed. The issues need to be brought "up-front". It is probable that very few submissions to municipalities have been preceded by a business plan and a market survey. It may also be true that until recently many of the applicants were unaware of the planning complexity to such requests. It might be concluded that the lesser submissions are entirely speculative, although the Project Team does not have evidence to support that conclusion.

9.5 The Banks and Other Funding

If ten courses, for example, each costing $10,000,000 were funded over a five year period, the industry would require $100 million...not a lot of money when considered against the entire capital market. Commercial banks might optimistically provide 40% of this demand, but an average of 25% is more likely in current market conditions with the balance being funded by other means. The banks' general reluctance to lend to golf courses derives not from anything fundamentally negative about the industry but rather from the fact that there has been little funding experience and therefore little incentive to pursue it. Clearly, the number of prospective loans is few.

Golf course financing is seen by some as real estate financing. Real estate development projects are often funded by Canada's large institutional investors such as pension funds and insurance companies. These institutions are tending to invest more and more in real estate and some have targeted golf course development. However, the actual movement into the golf course industry appears to be some time away. The investment characteristics of new golf courses does not fit the venture capital industry well. Investment dealers and brokerage houses find this type of investment difficult to market because of lack of liquidity, its inherent risk and the limited history of profitability in the Study Area. The most likely source of capital is the Japanese investor. This is the same source that has been attempting with some success to purchase existing golf courses in the Study Area. Although paying to build new courses is very much less attractive, particularly to the Japanese, the shortage of courses will probably make Asian investors look to new construction. Add to the offshore investor a select group of local investors, many of whom are golf club members and have witnessed the growth of golf first hand, and this may form the likeliest source of capital for new courses in the immediate future.

9.6 The Reality of Development and Land Costs

Generally speaking a proposed "stand-alone" golf course needs to have one of two economic circumstances to be economically viable; low cost land, bought some years ago, or land cost amortized over a very long term. This long term amortization may be through agreements between developers and land owners or it could be through lease agreements with municipalities. The development alternative for a new course, where land costs are at a premium, is to include in the proposal associated facilities such as other recreational components, entertainment facilities, hotel and convention facilities and various kinds of housing. A large parcel of agricultural land in a single ownership requires less endeavour to be turned into a development proposal than land that is not consolidated and in many ownerships. Obviously, if the rules encourage that approach, a developer is foolish not to follow it. There is also the expectation, sometimes without justification, that site development costs of agricultural land will be minimal, when compared with raw land.

9.7 Sales of Golf Courses

Golf courses are selling, often to Japanese investors. The interest of the Japanese in the west of Canada and the USA is brought about by huge land costs and the consequent high cost of golf in Japan. While the Japanese are looking for the golfing experience and tourism benefits, the driving factor is investment in British Columbia real estate. *Royal LePage*, in their *B.C. Golf Course News*, report recent transactions in Washington State and British Columbia. It is reported that in the Study Area, a 900 acre site at Furry Creek, near Britannia Beach sold recently to a Japanese/B. C. group for $14.8 million. Meadow Gardens in Pitt Meadows was sold for $14.5 million to Japanese interests. Meadowlands Golf Course in Chilliwack sold for $4.5 million. Carnoustie Golf Course has sold twice in 1990. The first time for $10.5 million and later for $14.5 million. Based on information provided to prospective purchasers the present annual return on capital investment for this course is estimated to be little over 2%. The *Royal LePage* report notes that a driving range in Surrey and a course in Langley are listed. In later edition, the report noted that Fort Langley Golf Course had been sold recently and land for a proposed golf course in Pitt Meadows had changed hands during the approval process. From conversation with one golf course owner, unsolicited offers appear to be not unusual. During the course of this Study, the Project Manager has received many telephone calls and some visits on behalf of investors. One call was from a California company representing Japanese interests.

9.8 Cost Analysis Models : The Private Sector New Course

The following tables show the way land values can change the economic picture for a new course. The figures are for illustration and do not represent a particular proposal. The figures and descriptions have been simplified :-

Example 1

Land Area :	160 acres	Cost per acre ;	$20,000	Land Cost :	$3,200,000.00
Clubhouse :	16,000gsf.*	Cost per Sq.Ft	$150	Club House :	$2,400,000.00
Golf Course Construction					$2,700,000.00
Maintenance Building and Equipment ;					$900,000.00
Inventory and Fixtures :					$700,000.00
Working Capital and Pre-Opening Costs					$750,000.00
CAPITAL REQUIREMENTS					$10,650,000.00
*gross square feet					
Annual Golf Course Maintenance :					$500,000.00
Administration :					$350,000.00
Interest on Capital @ 10% :					$1,065,000.00
ANNUAL OPERATING COSTS					$2,115,000.00
45,000 ROUNDS OF GOLF @ $50.00					$2,115,000.00

Example 2

Land Area :	160 acres	Cost per acre ;	$30,000	Land Cost :	$4,800,000.00
Clubhouse :	16,000gsf.*	Cost per Sq.Ft	$150	Club House :	$2,400,000.00
Golf Course Construction					$2,700,000.00
Maintenance Building and Equipment ;					$900,000.00
Inventory and Fixtures :					$700,000.00
Working Capital and Pre-Opening Costs					$750,000.00
CAPITAL REQUIREMENTS					$12,250,000.00
*gross square feet					
Annual Golf Course Maintenance :					$500,000.00
Administration :					$350,000.00
Interest on Capital @ 10% :					$1,225,000.00
ANNUAL OPERATING COSTS					$2,275,000.00
45,000 ROUNDS OF GOLF @ $50.00					$2,250,000.00

Example 3

Land Area : 160 acres	Cost per acre ;	$40,000	Land Cost :	$6,400,000.00
Clubhouse :16,000gsf.*	Cost per Sq.Ft	$150	Club House :	$2,400,000.00
Golf Course Construction				$2,700,000.00
Maintenance Building and Equipment ;				$900,000.00
Inventory and Fixtures :				$700,000.00
Working Capital and Pre-Opening Costs				$750,000.00
CAPITAL REQUIREMENTS				$13,850,000.00
*gross square feet				
Annual Golf Course Maintenance :				$500,000.00
Administration :				$350,000.00
Interest on Capital @ 10% :				$1,385,000.00
ANNUAL OPERATING COSTS				$2,435,000.00
45,000 ROUNDS OF GOLF @ $54.00				$2,430,000.00

Example 4

Land Area : 160 acres	Cost per acre ;	$50,000	Land Cost :	$8,000,000.00
Clubhouse :16,000gsf.*	Cost per Sq.Ft	$150	Club House :	$2,400,000.00
Golf Course Construction				$2,700,000.00
Maintenance Building and Equipment ;				$900,000.00
Inventory and Fixtures :				$700,000.00
Working Capital and Pre-Opening Costs				$750,000.00
CAPITAL REQUIREMENTS				$15,450,000.00
*gross square feet				
Annual Golf Course Maintenance :				$500,000.00
Administration :				$350,000.00
Interest on Capital @ 10% :				$1,545,000.00
ANNUAL OPERATING COSTS				$2,595,000.00
45,000 ROUNDS OF GOLF @ $58.00				$2,610,000.00

Example 5

Land Area : 160 acres	Cost per acre ; $60,000	Land Cost :	$9,600,000.00
Clubhouse :16,000gsf.*	Cost per Sq.Ft $150	Club House :	$2,400,000.00
Golf Course Construction			$2,700,000.00
Maintenance Building and Equipment ;			$900,000.00
Inventory and Fixtures :			$700,000.00
Working Capital and Pre-Opening Costs			$750,000.00
CAPITAL REQUIREMENTS			$17,050,000.00
*gross square feet			
Annual Golf Course Maintenance :			$500,000.00
Administration :			$350,000.00
Interest on Capital @ 10% :			$1,705,000.00
ANNUAL OPERATING COSTS			$2,755,000.00
45,000 ROUNDS OF GOLF @ $61.00			$2,745,000.00

9.9 An Analysis

In summary, a "stand alone" golf course operation must accommodate 45,000 rounds of golf at $47.00 per round to break even, based on the cost of the land being $20,000 per acre. The estimated number of rounds is not unreasonable for a well located golf course in the Study Area. Newer courses are reporting a similar number of rounds. The cost of the round to the golfer, however, is above present market, even allowing for recent increases partly caused by the cost of GST. A golfer might pay $60.00 per 18 hole round, if the golfing experience is of a sufficiently high quality. This is very high when compared with the cost of a round on a Vancouver municipal course ($19.00 for 18 holes this year, 1991). In the Study Area, there is little or no zoned golf course land at $20,000 acre. A 100% increase in land costs, e.g. from $20.00 to $40.00 per acre, leads to an increase of 15% in the cost of a round ($47.00 to $54.00).

9.10 Cost Analysis Models : The Public Sector

A comparative analysis of municipally owned golf courses in the Study Area shows that they are "profitable" and are heavily used by the recreational golfer. The following figures, for comparative purposes, are for 1988. For the purpose of this analysis, the courses, with the exception of Burnaby Mountain, are essentially "stand-alone" courses. The "profitability" is simply because the land value is not part of the financial equation and municipal courses do not pay property taxes. The following figures have changed since 1988 and some of the later figures are reported elsewhere in this Study. Note : the figures on the following page exclude income from the club house.

The Burnaby Mountain course and the Riverway course, now under construction, is evidence of public golf course development as a matter of municipal government policy. The District of Burnaby has lease agreements with the golf-pro and a food service facility lessee. The District, like Vancouver and others, retains responsibility for grounds management. The existing Burnaby course was developed and upgraded by the municipality. The buildings were constructed by the municipality. The operational aspects, excluding course maintenance, are seen to be the role of the private sector. The City of Vancouver Parks Board has recently hired a golf course architect to investigate the upgrading of their facilities. The plan, which is still in the development stage, will likely include not only a proposal to improve greens and fairways but also ideas on income generating activities. During the course of this Study, there has been more than one expression of interest from the private sector for this sort of arrangement. In areas of high land cost and high residential densities, this is a viable way to provide a golfing experience for the public. It also avoids the "thin end of the wedge" scenario if the municipality retains land ownership.

	Burnaby Mountain Burnaby	Fraserview Vancouver	Langara Vancouver	McCleery Vancouver	Gleneagles West Vancouver
No. of Holes	18	18	18	18	9
Area	135 acres	211 acres	123 acres	124 acres	46 acres
Rounds (1988)	88,675	85,482	78,855	76,800	60,000
Revenues	$835,127	$881,000	$764,000	$726,000	$440,000
Driving Range	$267,283	$206,000			
Total	$1,102,410	$1,087,700			
Expenditures	$712,173*	$678,450	$480,000	$502,700	$240,00
1988 Net Income	$390,237*	$409,350**	$285,000	$224,000	$200,000
*Excludes Driving Range expenditures			** Includes $75,650 from Driving Range		
1988 Fees per Round					
Adult	$14.50	$14.50	$14.50	$14.50	$7.25
Seniors/Youth	$7.50	$7.50	$7.50	$7.50	$4.50

Source : Simons Planning and Development

9.11 The Private Club

The management and economic viability of a private club is entirely the responsibility of the membership. Both financing and operational costs are carried by the members. To assist financing, some clubs elect to open up the course to non-members on a pay-as-you-play basis. As land values increase, there is a possibility that the members can benefit by relocating the course to lower cost land.

Private courses in the Study Area offer membership on an equity/non-equity basis and provide an extensive array of associated facilities. Membership of the Club is coveted and in most cases not easy to acquire for reasons of high cost and lack of availability. It is not expected that this kind of club will meet the demands of the pay-as-you-play golfer, who makes up as much as 79% of the golfing fraternity.

9.12 The Cost of Golf and Accessibility

Only two golfers have aired their views to the Project Manager. They expressed concern over the rising cost of golf. Ironically, in all of the events since the Order-in-Council, it is the golfer that has had little to say. Initiation fees for private clubs and green fees for semi-public and public courses have exceeded inflation. The sales of golf courses to off-shore buyers, the cost of producing new courses and the low number of approvals for new golf courses will probably limit the availability of facilities to the general public. This will do three things; raise the cost of golf further; raise demand on municipal courses; press golfers to seek their recreational experience in Washington State. It is reported that some courses in Washington already accommodate 75% use by Canadians.

Sample 1990 Fees and Dues at Selected Private Golf Clubs

Men's	Initiation Fee	Annual Dues	Green Fee
Shaughnessy	$28,000	$165.00	$100/$30/$20*
Capilano	$34,400	$2,076.00	$100/$40/$15
Vancouver	$25,000	$132.00	$100/$30
Richmond	$18,000	$194.50	included
Marine Drive	$21,000	$128.00	$75/$30

Green Fees appear to have gone up by about 20% over the last twelve months at courses in the Study Area. The increases are in semi-private, public and municipal courses. Fees have changed for 1991, due in part to the added cost of the Goods and Services Tax. This information was too late for inclusion in this Study.

Sample 1990 Green Fees at Public Courses in the Study Area for Weekday Play

	1989	1990
Burnaby Mountain	$14.50	$15.50
Chilliwack	$22.00	$22.00
Guildford	$15.00	$18.00
Ledgeview	$20.00	$22.00
Peace Portal	$20.00	$26.00
Seymour	$18.00	$21.00
Surrey	$15.00	$17.00
Vancouver Parks Board.	$14.50	$17.00

9.13 The Golfing Year

A general estimate of the golfing year in the coastal area and much of the Fraser Valley is 275 golf days, including 56 weekend days, 6 holidays and 213 weekdays. High season for golfing activity is May to September. October to November and March to April are moderate demand months. Low play occurs in December to February, weather and course conditions permitting. In the higher altitudes, Whistler for example, the play is curtailed by elevation, sun exposure limited by mountain faces, freezing conditions and time of melt-off.

9.14 Conclusions

It is suspected that very few golf course applications in the Study Area are preceded by a business plan or a market survey.

A privately owned "stand-alone" golf course is unlikely to be financially viable in the early years unless it is supported by associated revenue generating activities or the land cost has been discounted in some way or the capital is provided through the cost of membership or the course is purchased by international buyers.

The cost of golfing to the private golfer and the general public is increasing at rates well beyond the rate of inflation and will continue to increase in the foreseeable future.

Golf courses on municipally owned land have the advantage of being able to offer a recreational activity at prices not influenced by the cost of the land. Unlike other recreational activities provided by municipalities, golf has the potential to be self-financing and profit generating.

So far, golf course applications reflect prevailing methods of providing a golfing experience. There is little innovation in the proposals in the Study Area, except by way of adding activities to the traditional facilities.

NOTE : THE RECOMMENDATIONS OF THIS STUDY ARE INFLUENCED BY CONCLUSIONS FROM MORE THAN ONE CHAPTER. FOR DETAILS OF THE RECOMMENDATIONS SEE CHAPTER 21.0

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

10.0 GOLF COURSES : TAXATION ASSESSMENT

10.0 GOLF COURSES : A TAXATION ASSESSMENT

10.1. Introduction

This section reports on some of the questions and factors that influence a municipality's response to golf course development applications from a municipal financial perspective. There are no rules of thumb and each golf course must be examined on its own. This section briefly discusses how golf courses are assessed and how they can be taxed by a municipality. It outlines some of the municipal revenue and municipal cost information and concepts that should be considered. Finally, it presents a list of questions a municipality should address in the course of examining an application for golf course development. Obviously, the focus is on financial matters. However, there are many non-financial issues to be examined when assessing the merits of a particular golf course development proposal. These include environmental concerns and the definition and attainment of community goals, among others.

10.2 Recommendations on Information Needs

Several recommendations are made regarding information needed by a municipality (or by a regional district), or policies to be adopted, in order to adequately assess the impacts of a proposed development. These occur throughout the following text. Some are also mentioned elsewhere in the Study. Foremost among these are the following:

- The developer should provide evidence of the golf course's demand for water, how demand will be met, and what impacts there will be on other water users and on the community water supply.
- The municipality should ensure it understands the degree to which specific off-site facilities and services will be affected by the development, and the costs of accommodating any required changes caused by the development.
- The developer should provide evidence that the golf course is feasible; this is especially important when it is to be part of a comprehensive development with residential and/or commercial land uses.
- The municipality should not amend its community plan to accommodate a golf course before it has determined whether or not ancillary uses will be requested or required.
- The municipality should examine its existing recreation/non-profit assessment base to determine whether a proposal would have a significant effect on this property class, since other non-profit groups might be excessively burdened by changes in the tax rate for this class.

10.3 Property Assessments : Basis for Assessed Values

Golf courses are assessed by the British Columbia Assessment Authority as commercial enterprises (class 6); a golf course assessment is based on its ability to generate net income. This applies to private clubs even though they are not intended to produce net income; they are assessed on the basis of the incomes they could generate if they were public courses. The net income is converted into a lump-sum value via a capitalization rate that is derived from the sale price/net income ratios of golf courses that have been sold. Various adjustments to the capitalization rate and income estimates are made as required to reflect differences among golf courses. In very general terms, the better and more attractive the golfing experience, the higher the green fees that the market will bear; the higher the green fees, the higher the property assessment.

The club houses, pro shops, and other structures are generally assessed at their building costs (after depreciation), and the remainder of the income-capitalized value is deemed to be the property assessment for the course itself. The buildings are usually on the assessment roll as business properties - assessment class 6. The course and grounds are put on the assessment roll as recreation and non-profit - assessment class 8. This class also includes other outdoor recreation facilities (ski hills, race tracks, marinas, go-cart tracks, etc) and numerous non-profit facilities such as legion halls.

10.4 Typical Assessed Values

Since the ability to generate income depends on a number of factors, there is great variation in property assessments from course to course. Income potential is affected by course layout, terrain, and location. In addition, income differences also stem from variation in clubhouse facilities, where food and beverage services generate considerable revenue. Examples of 1991 assessments include the following 18-hole courses :-

Meadowlands Golf & Country Club (Abbotsford)	$ 1,007,000
Ledgeview Golf & Country Club (Abbotsford/Matsqui)	$ 3,788,000
Chilliwack Golf & Country Club (Chilliwack)	$ 3,100,000
Beach Grove Golf Club (Tsawwassen)	$ 4,545,000
Marine Drive Golf Course (Vancouver)	$ 8,369,000
University Golf Course (University Endowment Lands)	$11,549,000

10.5 Increase in Assessments

There has been a tremendous increase in the assessed values of golf courses as a result of the increase in market values and sale prices. Between 1989 and 1991, the average increase in assessed values for the sample courses listed above was 265%. Many courses saw assessment increases well above this average. By comparison, the average residential property assessment in the above sample municipalities rose 51% and across the Province increased by 45%.

10.6 Proposed Assessment

The taxable assessment is half of the property tax equation; the tax rate is the other. It is important that a municipality obtain a reasonable estimate of a proposed golf course's property assessment in order to develop a more confident understanding of the revenue-cost balance of a proposed golf course.

The developer's estimate of the construction costs for the clubhouse and other buildings is of interest, but his estimate of the overall golf course value is not particularly useful here. The developer should be asked to provide the estimated number of rounds and the proposed green fees, as well as other revenue estimates. This information is important data in the golf course assessment process.

Informal discussions should be held with the Assessment Authority to benefit from their substantial knowledge base on golf course values. When doing so the municipality must make it clear that it does not expect the Authority to render any opinions of value but to assist as it may see fit. Larger municipalities might feel more comfortable preparing their own projections of taxable value; others should consider hiring specialists for this if the Assessment Authority is unable to help.

10.7 Municipal Taxes : Two Property Classes

The municipal taxes, generated by a golf course, depend on the assessed values and the municipal tax rates for each of the two assessment classes - business (class 6) and recreation (class 8). Each municipality is free to set its own budgets and tax schedules, but it cannot set specific golf course tax rates. The tax rate adopted by a municipal council for business property (assessment class 6) applies to all taxable class 6 properties, and the rate selected for recreation/non-profit properties applies to all taxable class 8 properties. This means that a municipal council should examine the property tax implications for other recreation and non-profit properties when it considers a tax rate that it feels will be appropriate for a golf course. The need to generate municipal tax revenues from golf courses to recover offset municipal costs must be weighted against the effects this would have on other assessment class 8 properties such as legion halls, ski hills, marinas, race tracks, lawn bowling clubs, riding stables, and so on.

10.8 Exemption from Taxes

Under Section 400 and Section 401 of the Municipal Act, a council may exempt from municipal taxes a recreation facility owned by a club or association, used entirely by the general public, for a maximum of ten years; this is called a "permissive exemption". There are numerous examples of this in the Province, although it is not known how many golf courses are exempt. Private clubs are not eligible for this because they are not open to the public.

A municipal council would have to believe that a golf course fulfilled an important recreational role in the community to warrant tax-exempt status. As more and more golf courses are developed, more and more of the population will have access to the sport at multiple locations. This means that the importance attached to any particular course will diminish and the justification for extending the inducement of tax exemption will also diminish. In addition, as the demand for more golf courses continues, municipal councils will have to be aware of the effects of tax exemption on the supply of golf courses. New public courses will have to compete with existing public courses; the new ones will be at a disadvantage if they must pay municipal taxes in competition against courses that are tax exempt. Tax exempt status for some older courses but not for newer courses may be perceived as an impediment to the growth of the industry.

Councils should consider the effects of Section 400 exemptions carefully in a rising golf market to ensure that any taxation benefit accrues to the municipality. Of course, some golf courses are exempt because they are owned and operated by a government body. For example, the McCleery course in Vancouver is owned and operated by the City of Vancouver. In cases where there is a significant number of alternative golf courses, a municipality that owns a golf course should at least consider the idea of leasing out its golf course to an operator who would pay municipal taxes and compete with other public golf course operations on a more even footing. A municipality might choose not to do this in cases where there are no good alternatives to the municipal course.

10.9 Reduced Municipal Taxes

Under Section 402 of the Municipal Act, a municipality can enter into an agreement with a golf course owner to "set" the assessment for all property taxes (except school taxes) for a minimum of 10 years. Even though the B. C. Assessment Authority continues to show the "actual" value on the assessment roll, the agreement value is in fact used when calculating municipal taxes. Section 402(5) allows the municipality to amend or rescind the agreement with the consent of the Minister.

There are very few cases of this reduced assessment agreement. One reason is that Section 403(2) gives the municipality 50% of the difference between the "agreement" assessment and the "actual" assessment if the land is sold before the expiration of the agreement or if the use of the land changes during the agreement. This would normally be a substantial sum in a rising golf market, as evidenced by the steep increase in assessments as discussed earlier for the sample golf courses. In addition to this "profit" sharing, Section 403(3)(a) of the Act requires the owner to repay, with interest, all the taxes "saved" during the agreement due to the lowered assessment. There are other liabilities for the selling owner as well.

An important feature of Section 402 and Section 403 is that the profit sharing and tax pay-back are triggered by a change in the ownership of the golf course. The shares in a company can be sold without a change in the registered owner of the land if the company owns the land. The Act requires a change in land ownership to trigger the municipal claims; a transfer of company shares would not be sufficient. For a new golf course, this feature works much more to the favour of the owner than the municipality because, since a company would be created to own the golf course, a share transfer would be used to sell the golf course without penalty if the owners wanted to sell it.

Section 403(4) specifies that the owner must pay back the "saved" taxes if the use of the land changes. In addition, Section 403(5) gives the municipality the right of first refusal on the property if it is offered for sale.

A municipality should carefully consider whether property tax relief is warranted under either of these sections of the Municipal Act. It should develop a clear set of policies and criteria that can be applied consistently when the issue of tax relief arises. The criteria should include the following :-

- How essential is tax relief to the success of the golf course ?
- Would the developer fail to proceed if the course must pay "normal" property taxes ?
- How essential is the venture itself to the community? Are there other golf courses available to residents ?
- Is the golf course enterprise substantially different from any other commercial enterprise from a community enhancement point of view ?

- How are similarly circumstanced golf courses taxed? Would tax relief provide an unfair advantage to one developer ?
- How large should the tax relief be if relief is warranted ?
- What are the estimated taxes before relief is granted ?

10.10 Direct Risks : Financial Risks

There are a number of environmental and social concerns that are not addressed by a purely financial look.

The municipal financial risks associated with the development of golf courses are essentially the same as with other developments that entail significant land use changes. Basically, the question is whether the extra municipal revenues from the development will cover the extra municipal costs (both now and in the future). The "direct" risk deals with the impacts of the golf course itself, as distinct from indirect risks associated with land use changes brought by the golf course development.

10.11 Revenues

Golf courses can generate far greater municipal taxes than can farm properties. There are several reasons for this :-

- The assessed land values are much higher for a golf course
- The golf buildings pay the higher business tax rates rather than the lower farm building rates
- The basic exemption for golf buildings is $10,000; the farm building exemption is $50,000

Since the golf course buildings usually (but not always) comprise a small part of a municipality's total business properties (assessment class 6), the addition of a new golf course will not have much influence on the business property tax rate selected by a municipal council. This is of course more true for larger municipalities than for smaller municipalities. On the other hand, the case of the property assessments on the grounds and golf course land are included in assessment class 8. ("recreation and non-profit") along with legion halls and other outdoor recreation properties. It is entirely possible that the creation of a new golf course could have a substantial effect on the class 8 assessments - perhaps doubling or tripling the total taxable assessments in this class. This means that a municipal council should be careful when setting the class 8 tax rate. Raising the rate to ensure that the new golf course pays its fair share of municipal costs could have an unintended and punitive effect on the original non-profit and recreation taxpayers. It may not be possible to levy a municipal tax rate that will recover the appropriate sums from the golf courses without an unacceptable burden on other class 8 properties.

Bearing in mind that golf courses require large amounts of water, it is important that a municipality ensure that water metering be used as the basis for water consumption charges if a golf course uses a municipal water system.

10.12 Operating Costs

In general terms the annual costs of providing municipal services are not greatly affected by the addition of a golf course. Of course, the extra costs brought about by creating a new golf course will vary from case to case, but, aside from the start-up costs associated with processing and assessing golf course development applications, these following "standard" municipal departmental services are usually not affected significantly :

- Administration.
- Police protection.
- Fire protection.
- Other protection (building inspection, bylaw enforcement, emergency planning, etc.).
- Road transport (street maintenance, sidewalks, traffic control, street lights, drainage, etc.).
- Garbage collection and disposal.
- Community planning and zoning.
- Recreational and cultural facilities and programs.
- Bank charges and operating loan interest.

When considering a golf course proposal, a municipality should examine the probable impacts the proposal would have on each specific service. Service capacities and thresholds should be identified - that is, the degree to which each department would be affected should be considered. Would the addition of the golf course require more staff for services that are now provided at the limit of their capacities? Would any new equipment or extra contracts be required to maintain the current level of services, or would some services to the community as a whole deteriorate if the current resources are used to deliver municipal services to the expanded community?

These questions should be asked for all significant development proposals, not just golf courses. The smaller the community, the smaller the development proposal has to be in order to have a significant effect on the municipal operating costs. The smaller the community, the greater the need for an assessment of cost impacts from development proposal of a given size.

10.13 Capital Costs

In addition to the costs of providing on-going municipal services, there are potential capital cost impacts to be considered. These capital costs matter because if the municipality finances them, either the municipal debt costs rise or its investment income falls; in either case, extra taxes must be generated. Alternatively, service budgets could be cut to keep taxes stable, but then there will be a social cost in the form of poorer community services.

As with all large-scale developments, the municipality should examine each infrastructure category to determine if or how it would be affected by the golf course proposal. These categories include :-

- Roads, streets, intersections, traffic control, street lights
- Storm water drainage
- Fire hall and fire equipment
- Garbage disposal
- Water supply and distribution system
- Sanitary sewage treatment and collection system

It is possible but doubtful, that a single golf course by itself would have unusual impact on open space and sanitary sewer requirements. Roads and traffic control are also less likely to be affected, but cannot be ignored. Drainage could be important and is covered elsewhere in the Study. Most important, however, is the water system. Given the great water requirements of golf courses, the municipality should require the developer to provide satisfactory evidence of its water requirements in terms of :-

- Annual volumes
- Peak period volumes
- Proposed water supply (i.e, municipal system or self-contained water source)
- Adequacy of this source to provide the required flows and, in the case of a municipal water supply, the remaining capacity in the municipal system
- Adequacy of the existing municipal distribution system when municipal mains are to be used to deliver water to the property.
- Impacts the golf course would have on other water users connected to the same system

The purpose of this assessment process is to ensure that the development does not impose an undue hardship on the community systems. It is important to identify any thresholds that might be crossed as a result of the development. The municipality should ensure it understands the consequences of a large development both as an impact by itself and as part of a series of community changes. The efficient planning of community infrastructure requires planning for change.

Where road, drainage, water, sanitary sewer, or open space infrastructure must be expanded as a result of golf course development, the municipality has two choices :-

- Enact a development cost charge (DCC) bylaw that includes golf courses as an identified use and establish charges that refer specifically to golf course development as well as to other uses. The use of DCCs to finance expanded infrastructure is a well-established part of municipal finance in B. C. While there are no identified cases of a DCC bylaw that includes a specific golf course DCC, this would be an entirely acceptable practice under Section 983 and Section 984 of the Municipal Act. The use of DCCs that apply to a golf course is particularly important where a comprehensive development proposal includes a golf course along with other uses such as residential and commercial.
- Ask the developer to correct off-site deficiencies - such as installing a new or larger water line near the proposed site - at his own expense. Section 990 of the Municipal Act allows the municipality to require extended services of the developer under certain conditions. It is very common for a municipality and a developer to agree that certain off-site services will be corrected at the developer's sole or shared expense.

The municipality will face extra debt costs (or, with the same effect, foregone interest revenue) if the costs of the required expansion or upgrading of municipal infrastructure are not fully recovered from the developer in one of these two ways.

This does not by itself mean a tax increase, however, since the development might generate extra taxes sufficient to cover the extra debt costs.

10.14 Revenue and Expense Balance

After having reviewed the anticipated extra costs - both operating and debt costs - associated with a golf course development, the municipality can then compare the extra tax revenues that would be generated by the golf course using the current business (assessment class 6) and recreation (class 8) tax rates and using the anticipated assessments. If the revenues exceed the costs, no tax rate increase would be required. If the costs exceed the revenues, the municipality has two choices :-

- Raise the tax rates. This could create hardship for other properties in these assessment classes and so considerable caution should be exercised before this option is selected.
- Do nothing and, in essence, spread the tax increase across all properties, not just business and recreation classes. Where there is little confidence in the accuracy of the cost estimate, or where the extra costs are slight, this may be the best option, especially bearing in mind that the golf course (if public) will meet a broader community need.

10.15 Indirect Risks

Golf courses may share many similarities with other commercial enterprises, but their great land requirements set them apart. While there are usually a number of potential users for any given commercial property, it is difficult to imagine what alternate commercial uses there would be for a golf course. The enormous land requirements affect the municipal risks associated with golf course failure. This uniqueness is heightened when a golf course is created within the Agricultural Land Reserve.

10.16 Property Tax Risks

A failed retail store might be replaced by a new retail store or office without the need for Official Community Plan amendment, rezoning, or expanded municipal services; this is not true for a golf course. Other than a farm, there is no obvious land use replacement for a failed golf course that would require all the property or the clubhouse. The more unique the property, the lower its marketability and the greater the chance that the tax sale procedure would have to be used to recover unpaid municipal taxes. It is much more conceivable that the municipality could, because of unpaid property taxes, wind up the owner of a failed golf course than the owner of a shopping center...and this has occurred in the study area.

In some cases this might not be viewed as a severe problem because the public would wind up with a community asset that, like a park, might not pay its way on a direct cash flow basis but is nonetheless a valuable addition to the wealth of the community. Whether the residents would choose to own and operate such a facility under different circumstances is not part of this study.

10.17 Unplanned Growth Due to Golf Course Failure

A failing golf course might be sold to a new operator without causing municipal impacts, but market economics might rule out another operator's interest. As an aside and a word of caution, failure may be due to many things, one of which could be unrealistically high demands made of the golf course developer by the municipality. It is unlikely that the course could be sold for a non-golf use unless there are expectations of a more rewarding land use. Clearly, this higher land use is the perogative of the municipality. For a failing golf course in the Agricultural Land Reserve there would have to be an additional expectation that the land could be removed from the ALR as well as rezoned. (Of course, it is possible that a purchaser would convert the golf course to a farm, but this seems remote given the economics of farming in the Lower Mainland's urban realty market).

The lack of immediate replacement uses for a golf course property means greater pressure for rezoning and/or removal from the ALR if the golf course proves unprofitable. Municipal councils will face more strident requests for rezoning in the case of failed golf courses than in the cases of most other failed enterprises. Given the large amounts of land involved, the decisions for golf course rezoning are more important than decisions on many other rezoning requests. The risks associated with unplanned growth include service inefficiencies, higher marginal costs, and higher taxes.

10.18 Unplanned Growth Due to Ancillary Uses

Municipalities should be wary of a land use change being sought to save a failing golf course. A municipal council may never know whether a request for partial rezoning - say, residential development at the periphery of a golf course - is fairly claimed on grounds of the operator's financial survival. However, if profits from ancillary land developments are in fact required for continued golf course operations, then municipal council should re-assess the public benefits of retaining the golf course at all, for it is difficult to ensure that the profits from ancillary developments could be formally tied to the continuation of the golf course operation. This means that partial rezoning might not really address the public's need for the golf course at all. In addition, the development of ancillary uses after the golf course is created would almost certainly not be planned for in the Official Community Plan. While it is true that the same hardship claim for rezoning is frequently made by all sorts of property owners, the large amount of land involved with a golf course makes this more of a potential problem for future municipal councils and how they may deal with the situation. The problem is compounded when the course lies in the Agricultural Land Reserve.

10.19 Community Objectives

A golf course proposal might work for some community objectives and against others. Each case will be different, and each should be reviewed within the context of the Official Community Plan. A comprehensive golf course development with housing and/or commercial components should be examined in the context of its impacts on the growth in other areas of the municipality. With a low demand for new housing, residential development in one area will delay growth in an existing area. This would reduce the DCC revenues from the existing area, or delay the population growth that might be needed to complete a village concept in an existing area.

While it may be stating the obvious, the larger the proposal and the smaller the municipality, the greater the need to carefully consider changes to the Official Community Plan to accommodate a golf course. The municipality should make sure it understands the potential for subsequent requests for ancillary developments before it revises its Official Community Plan. This aspect is less important for development applications involving just a golf course, with no residential or commercial uses.

10.20 A Summary

The following questions should be considered by a municipality when examining the financial consequences of a golf course development. Many of these questions apply with heightened importance in cases of comprehensive development proposals with residential and commercial uses along with the golf course :-

Property Assessment

- What is the projected taxable value of the golf course?
- Is sufficient information available to make a confident projection of this assessment?
- Has the developer indicated the green fees, number of rounds expected, and other revenue-related data?
- Has the BC Assessment Authority been asked for informal comment on the proposal or for information on similar golf courses?
- Is this projected value reasonable compared to other golf course assessments?
- How much of the property assessment would be in the business category (assessment class 6) versus recreation (class 8)?
- How much other class 6 and class 8 assessments are there in the municipality now?
- Would this development significantly affect each class total assessment?

Tax Revenue

- Would a change in the business and recreation tax rates place a hardship on existing class 6 and class 8 properties?
- Is this golf course eligible for tax relief under the Municipal Act (i.e, is it a public club)?
- Is there a set of criteria to be used when considering property tax relief under Section 400 or Section 402 of the Municipal Act?

Municipal Operating Costs

- Has each municipal department been examined to ascertain whether the proposed golf course would require extended or expanded services?
- Can extra costs be reasonably estimated for these extra services?
- Will water metering be required, and what meter rates are required for golf course operations?
- How do these water rates compare to other metered rates charged for other land uses in the municipality?

Municipal Debt Costs

- Has each category of community infrastructure been examined to determine its adequacy in light of the proposed development? Will any capacity thresholds be crossed as a result of the proposal? What off-site improvements to municipal services would be required?
- In particular, how much water will be required, how will it be provided, and what effects will this have on other water users in the community?
- Will significant traffic be generated by this development and, if so, will the existing road system handle it? Will traffic improvements be required?
- If an expanded infrastructure is required, how much (if any) should be financed in the form of development cost charges (DCCs)? Should there be a specific DCC rate for golf courses?
- Is subdivision involved in the golf course development? If so, should DCCs be payable upon subdivision or upon issuance of a building permit?
- To what extent should "extended" services be required of the developer under Section 990 of the Municipal Act? Should the municipality finance these or require the developer to install them?

Revenue-Cost Balance

- Would the extra costs (operating and capital) exceed the extra taxes from the development?
- How much confidence is there in this estimated revenue-cost balance?
- Is there enough confidence, and is the excess cost large enough, to warrant correction by increasing the business and/or recreation tax rates?
- How much would the class 6 and class 8 tax rates have to be raised to meet required extra taxes?

Indirect Risks

- If the proposal includes commercial and residential developments, will these have any effect on the anticipated commercial and residential growth elsewhere in the municipality? Will they work against the fulfillment of specific community plan objectives for other areas?
- How much competition will this golf course face?
- Is it likely that it will fail as a viable enterprise and be unable to pay property taxes?
- It is unlikely that a buyer could be found if this golf course flounders financially?
- Is the developer proposing ancillary uses - such as housing and commercial outlets - to generate capital for the creation of the golf course?
- Would this course be feasible on its own? If it appears of doubtful feasibility on its own, can the developer demonstrate any link between the sale of non-golf properties and the continued operation of the course itself?
- Is it likely that a later claim for ancillary growth in order to subsidize the golf course can be accommodated within an overall community plan?
- How much is known about the costs and efficiencies of unplanned development in this area of the municipality?

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

11.0 PERCEIVED BENEFITS OF GOLF COURSES

11.0 PERCEIVED BENEFITS OF GOLF COURSES

11 Introduction

This section responds to the request in the Proposal Call for a description of the benefits of golf course development. The comments are general and can be applied to other places as well as the Lower Mainland. The Study Area, however, has a population growth, a climate and a geography that is particularly conducive to the development of the golfing industry. The case for golf courses and the benefits have been the subject of tomes too numerous to mention. Nonetheless, the perceptions of benefit are subjective and are open to interpretation.

11.2 Meeting a Demand and Perceptions

A golf course in the Study Area is already providing a response to a demand that not only exists but has been shown to be expanding. See Chapters 6.0 and 7.0.

11.3 Enhancing Land Values

Estimates of increased land value of golf courses are seen in the sales that have occurred recently. In more than one scenario, being painted by private developers and by at least one municipality, adjacent residential land is projected to increase by about 30% as a result of proximity to a golf course.

11.4 A Key to Further Development

A golf course can be a key to further development. Indeed, it may be the foundation of multi-purpose land use on the site and adjacent to it. Proposals for undeveloped land in the Study Area include residential development, hotel and associated facilities with a golf course. While this may be entirely due to the economics of the golf course development and operational factors, it is also seen by the developer as a design and marketing asset for the whole development.

11.5 Open Space and Beautification

Golf courses can be the open area that provides relief as urban development occurs around it. When the landscape matures, the course seems to become an established landscape entity and increasingly important to people around it. While there is evidence to show that golf courses are seen by some as a transitional use, it would be hard to anticipate the closure of City of Vancouver courses, for example, without a great deal of protest, even though the land tends to be zoned for single family housing. Indeed, as the region develops, the open spaces provided by golf courses will become more important to a community increasing in development density. Stand-alone golf courses can be part of "green zones" and recreational areas between urban and regional centres.

11.6 A Buffer between Different Land Uses

Very few of the older golf courses in the Study Area appear to have been deliberately sited to act as a buffer between differing land uses. One suspects that the older courses were once in wide open land and it was only later that urban development congregated towards them. The historic Vancouver Golf Course in

Coquitlam typifies this scenario. Interestingly, the courses adjacent to the Marine Drive escarpment in Vancouver fulfill the buffer function, with land, land fill and river activity being one adjacent use and up-scale residences the other. Courses adjacent to highways and airports do the same thing. Today, many proposals being made by developers and many positions being taken by municipalities support the use of golf courses as land use buffers. It can, for example, be seen in the planning of approved courses in Langley and potential courses in Coquitlam and Matsqui/Abbotsford. The courses may act as the transition between wilderness areas and housing, habitat and housing, highways and housing, farming and housing, housing and commerce or light industry, airports and non-airport land uses. Indeed, some golf courses exist under flight paths...presumably the aircraft are well above golf ball trajectories.

11.7 Potential for Associated Outdoor Recreational Activities

The modest but stunningly sited Gleneagles Course in West Vancouver includes a tennis court and a delightful pathway by a creek leading to the waterfront. Langara Course in Vancouver has a jogging track. A course being planned in the Fraser Valley includes a trail for horses. With the proper dimensions for the safety and security of other recreational users than golfers, there is no reason why a golf course cannot be the provider of other recreational opportunity.

11.8 Tourism and Other Industry

This Study has already described the interest the tourism industry has in golf (Chapter 8.0). The Study Area is strategically located to take advantage of national and international tourism. Our climate is mild and our landscape splendid. While there is concern over the impact that such endeavours may have on access to golf for the community, it should be noted that British Columbia has successfully shown itself to the world through Expo '86. A choice has already been made. Tourism is a growth industry and is labour intensive. The Resort Municipality of Whistler is committed to course development for the tourist. The further development of Vancouver International Airport is seen as benefit to the tourist golf course. Fraser Valley airfields are a short flight from Vancouver International and Seattle/Tacoma airports.

11.9 Tournaments

The Quilchena Golf Course in September 1990 hosted the CPGA Trans-America Championship tournament. It is estimated that there were over 130 players and 10,000 spectators. A tournament is attractive to a Club since it creates activity with only a marginal increase in staffing. The golf tournament is an essential element of the sport of golf. Tournaments range in scale from the office social to the 52 stops on the PGA Tour. They provide vital revenues to golf courses, as well as being important events on many a social calendar. In estimating the contribution of tournaments to golf demand, it is necessary to distinguish the demand for each of the two types, the social tournament and the professional event. Essentially the demand for the social tournaments are included in the calculations of recreational demand. This Study's definition of the participation rate (anyone who played a round of golf in the last year) obviously includes those who merely turned out for the office social. The only study which notes this demand separately is the study for Golfcorp Ventures Inc., as noted in Table 9. As they note, tournaments provide 12% of the demand, largely for the semi-private clubs[1]. The other form of tournament is the professional or semi-professional tournament. These contribute very little to the demand for golf although they do receive a large amount of media coverage. Of significance here are the additional tournaments which could be attracted to the Lower Mainland by the existence of a TPC course.

11.10 Construction

The construction cost, that in 1990 dollars, for the proposed Smugglers' Creek Golf Course in Langley is estimated to be $18,500,000. Design and construction will take over 18 to 24 months. Such a project would provide over 200 man-years of work for the general contractor, sub-trades and suppliers. Much of this income will be residual in the Study Area.

11.11 Payroll, Operating Budget and Personnel, Supplies and Equipment

The annual operating budget, in 1990 dollars, for the proposed Smugglers' Creek Golf Course in Langley is estimated to be $5,000,000. The facility will employ about 68 people on a permanent basis, rising to 125 people during busier times. Many of the peak-time jobs will be during summer months and be of interest to students and other young people. The payroll alone will be in excess of $2,000,000. The balance of the operating budget clearly show that the economic spin-offs for supplies and materials is substantial. The multiplier effect should also be noted.

11.12 Taxation Benefits

Section 10.0 covered the potential for cost recovery and taxes at the municipal level. Obviously, the golf course with associated development has a potential to provide sources of taxable income for all levels of government. This may be in the form of income tax, funds from the imposition of the Goods and Services Tax, and other tax legislation.

11.13 Education and Professional Development

Not least of the opportunities created by a viable golf course industry in the Study Area is the development of relevant educational programs. Greens management programs already exist at the post-secondary level in British Columbia. Greens management and golf course management will have to be upgraded to meet the demands from an increasingly competitive golfing industry.

11.14 Conclusion

The benefits are many. These benefits have to be balanced against the impact of golf course development on agriculture, the environment and other elements described in the chapters that follow.

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[1] Some of the Lower Mainland semi-private clubs market directly and successfully. Carnoustie in Coquitlam hosted over 130 social tournaments in 1988.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

12.0 GOLF COURSE DEVELOPMENT : MUNICIPAL APPROACHES

12.0 GOLF COURSE DEVELOPMENT : MUNICIPAL APPROACHES

12.1 Introduction

Reference to the municipal approaches is also made in 2.0 INTRODUCTION. This chapter describes the differences between municipal approaches in further detail. By way of opening the subject, this introductory section includes some of the text from the earlier chapter.

Approaches towards golf course and related development varies from municipality to municipality. Differences, usually justifiable, in zoning schedules abound and occur even between municipalities having a common boundary. Most municipalities have had for many years bylaws covering golf courses and driving ranges. These regulations vary from very brief requirements incorporated into recreational or agricultural zoning bylaws to very specific and extensive requirements in a golf course zoning bylaw. As a general rule, municipalities further away from the urban centre of the region are less restrictive in their zoning requirements. Many bylaw clauses in these municipalities have been written with an agricultural land use in mind rather than the control of golf course development. Three municipalities closer to the core, following the Order-in-Council, extensively reviewed their planning positions, zoning bylaws, locational criteria and processes because of pressure from the volume of applications. Delta, Surrey and Langley did seminal planning work in that regard. Staff in these municipalities became specialized in the subject. Councils, planners, developers and the communities came to a greater understanding of the requirements and development implications of golf course development. Elsewhere, municipalities with less agricultural land, as in North Vancouver and Burnaby, include golfing activities on land zoned for parks, wilderness and open recreation uses. In Vancouver, some golf courses continue to be on land zoned for single family housing. The Resort Municipality of Whistler includes golfing activities on land zoned for rural resort uses.

The municipal approach to golf goes beyond the zoning bylaw. Whistler has successfully used the proposal call process to acquire and control golf course development, with extensive requirements beyond those of a zoning bylaw. A proposed course in West Vancouver was rejected by public vote. However, this does not deny the case for the proposal call process. The use of land covenants to seek further control and achieve performance requirements is not uncommon. In another approach, Burnaby has for some years supported golf as part of a recreational program and is presently constructing a new course. There are no private courses in Burnaby. Elsewhere, Ledgeview Golf Course in Matsqui and Gleneagles Golf Course in West Vancouver are two examples of municipalities purchasing existing facilities and changing the access from private/semi-private to public use.

12.2 A Variety of Zoning Regulations

A survey of zoning bylaws and other statutes from municipalities in the Study Area shows a profusion of schedules for guiding golf course development. These are reported in Appendix "B"; Existing Golf Courses.

12.3 Jurisdictions and Planning Requirements

Golf course planning requirements reflect the level of concern over golf course development. In the view of the Project Team, the community impact has been less clearly understood than the concern for impact on the environment. By way of example, some proposals in Delta would have substantially changed the character of the municipality, regardless of the environmental impact. In Richmond, Delta and Surrey support, real or apparent, for golf course development has changed with the passage of time and since this report was commissioned. As noted earlier, community support for golf course development tends to increase proportional to the distance from Vancouver. This is perhaps an oversimplification, however, lower land costs are not the only factor: the development stage of a community is also significant. As these more distant areas accommodate development, one might expect a reduction in their support for it.

12.4 Examples of the Differences

The following examples are illustrative of the differences in zoning bylaws :-

Area requirements for Golf Courses (Some interpolation used)	Full Size	Intermediate Par 69 or less	Small Size No par rating
Abbotsford	100 acres* 125 to 175 acres	40 to 60 acres**	15 to 62 acres
Delta	100 acres +	70 to 100 acres	70 acres or less
Surrey	100 acres* 125 to 140 acrs	45 to 60 acres	15 to 45 acres***

*Challenge 18 hole course
**including Executive course
*** Par 3 course
Some municipalities have no specific requirement for land area

Parking requirements	Golf Course	Par 3	Driving Range
Chilliwack		3 spaces per fairway	1 space per tee
Delta	4 spaces per tee		1 space per tee
Dewdney Alouette R. D.	4 spaces per tee		1 space per tee
Mission	2 spaces per tee		
Port Coquitlam	8 spaces per hole		
Richmond	50 spaces per course		
Ministry of Highways	150 spaces		

In some of the above cases there is a requirement for additional parking for ancillary uses and staff. Some municipalities have no specified requirements for parking.

12.5 Site Coverage and Clauses

Site Coverage requirements vary from 15% to 40%. Buildings tend to be restricted to two floors and a maximum height of 35".0". There are varying requirements for setbacks. The setback requirements, in some bylaws, reflect an agricultural land and building use. Minimum lot sizes (4 or 5 acres are frequently quoted) also have wide variation, depending on the inclusion or exclusion of driving ranges in the bylaw. As noted in the introduction, clauses for golf course development are frequently in zoning regulations for agricultural land use. Some courses are zoned open land/recreational or are a recreational zone/outdoor recreation zone. There is a limited number of Golf Course District zones. Requirements for driving ranges (100 metres by 300 metres) usually show some consistency. Set-backs for golf course playing areas vary. In one case, the bylaw notes that fairways should be 100 feet away from property lines. In another, reference is made to housing on adjacent land.

12.6 Access and Signage Clauses

Some of the zoning bylaws controlling golf development make reference to access and to various kinds of signage. It should be noted that the Ministry of Transportation and Highways controls access within 800m of a controlled access highway and in unorganized territory. Presently, golf course signage is not permitted on provincial highways. The Ministry also has a minimum requirement for 150 parking spaces for an 18 hole golf course. These rules apply to unorganized territory.

12.7 The Proposal Call and Covenants

Whistler and West Vancouver are two municipalities that have used the golf course proposal call process. In both cases, the development proposals were subject to sets of requirements far beyond those found in a zoning bylaw. Land covenants were written providing for such things as public use and access to the private course, environmental monitoring and use of the course by tourists. Other municipalities have also used land covenants. It should be noted that covenants can be changed by the agreement of both parties. By way of comparison, Whistler has continued to use the process; the West Vancouver process was stopped at a referendum. It is worth noting that the federal government has also used the proposal call process to lease land for golf course development close to an airport, outside of the Study Area.

12.8 Conclusions

The schedule of zoning requirements varies widely throughout the region. Some municipalities include golf courses in specific zoning bylaws. Other municipalities incorporate golf course use into other zoning bylaws, particularly agricultural and recreational land use bylaws.

In unorganized territory, the schedule of requirements for golf course development is minimal and focuses on traffic and parking requirements.

Golf course experiences are provided by the public sector which are in very high demand.

Municipalities have tried to ensure golf course developments meet strict criteria through the use of covenants. Even with this approach, councils have had difficulty in gaining a level of support from the community for golf course development.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

13.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS FOR ADJACENT & COMPETING AGRICULTURAL LAND AND WATER USES

13.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS AND IMPLICATIONS FOR ADJACENT AND COMPETING AGRICULTURAL LAND AND WATER USES

13.1 Introduction

This chapter reviews the implications of golf course development on agricultural land. Since the Order-in-Council of 1988, most of the golf course applications in the Study Area have focussed on agricultural land. The potential for golf course development on agricultural land in the Lower Mainland is a fundamental reason for this Study. Agricultural land is not necessarily the best land for golf courses. It usually requires extensive grading and shaping and can be bereft of trees and plant material that provide safety between playing areas and bring character to the course. However, parcels of agricultural land are already assembled and therefore attract developers. When close to transportation corridors and urban areas, rezoning applications for agricultural land have been subject to intense scrutiny by councils and the community.

13.2 Land and Water Use Diversity

Like any other use, golf courses and their ancillary uses must compete and co-exist in an overall framework of all other land and water users. Within the study area, this framework is characterized by a broad range of use demands, a dynamic use pattern stimulated by a rapidly expanding regional population, and a complex and often contradictory.

Part of the land use diversity of the region is a direct result of its natural characteristics, comprising a generally moderate and attractive climate and an intricate pattern of fertile river valleys and fragmented uplands situated within the confines of spectacular mountain ranges and the Pacific Ocean.

The other major influence is the fact that the region currently is "home" to almost one and one half million people, comprising over half of B.C.'s total population. Because of projected growth, the population pressures upon the region's limited land and water resources can be expected to increase.

13.3 Pressures on the Urban and Rural Areas of the Region

A wide range of intensive and high value use demands already occupy much of the regional land base, including residential, commercial, industrial and institutional uses in addition to transportation and services corridors. These pressures tend to increase the land values closer to the heart of the urban areas. Increasingly, therefore, golf course developers are looking to the rural areas to meet the growing demands of an expanding golfing population. This is occurring in the midst of growing pressures on rural areas. These areas are still being looked upon to continue to provide significant raw forest materials, urban and rural water supplies, plus the opportunity for 80 or more agricultural commodities. These areas also provide a wide range of attractive outdoor recreation options, including golf courses, rural residential options, rural lifestyles and a productive fish and wildlife habitat.

13.4 A Complex Natural Landscape with Many Jurisdictions

The inherent complexity of the natural landscape, coupled with the dynamics of a rapidly growing population and increasing demands on land and water use, is further complicated by an ever changing jurisdictional and regulatory framework. This is particularly the case in the rural areas, where most of the proposed golf courses are located. The distribution of major land use activities is greatly influenced by legislation and the policies and programs of federal, provincial, regional and local governments, which may have conflicting goals. In addition and more than ever before, prospective land and water users must gain the acceptance of an increasingly aware public that is concerned with such issues as environmental protection, agricultural land preservation and wildlife habitat conservation. There is general concern over the cumulative impact of golf courses, particularly on the rural areas of the region and specifically in the Agricultural Land Reserve.

13.5 An Interpretation of "Impact"

For the purposes of this study, the question of "impact of golf course development upon other land and water users" is addressed in the broadest sense. It includes the potential impact of existing and proposed golf course developments upon adjacent land users. It reviews both conflicts and compatibilities, as well as long term implications of golf course development, given the introduction of essentially urban oriented uses into the rural community. Impact can be positive and negative. Of primary concern is the role golf courses play in the competition for the increasingly limited supply of rural land and associated water resources. On the other hand, the golfing experience itself can be negatively impacted by poor location from the perspective of natural characteristics, environmental setting and existing and potential adjacent land use.

13.6 Impact Assessment

Generalizations have been difficult to obtain and specific information is scarce. Impact and potential impact of golf course development can be expected to vary depending upon adjacent or alternate land uses. The nature of golf course development, specifically the degree of ancillary uses such as associated facilities and residential development, can greatly influence the degree of compatibility or conflict with adjacent land users. Given the diversity of the study area and the relatively recent escalation of golf course development demand, neither short range impacts nor long range impacts have been well documented. For the purposes of this study, extensive consultant experience with land and water use issues within the region has been supplemented by discussions with professionals within the various agencies, and levels of government and land users.

13.7 The Agricultural Setting of the Region

As mentioned earlier, there is concern regarding golf course development within the Agricultural Land Reserve. The concern is about the incompatibility or compatibility of golf course development with specific agricultural commodity production and agriculture in general. In the rural setting in which golf course land use exists and where proposals for new golf courses are focussed, agriculture exists within a sensitive land use framework, as follows :-

- The introduction of the Land Commission Act and the implementation of the Agriculture Land Reserve program in the early 1970s has decreased the conversion of high capability farmland to urban uses, but agriculture within the study area remains under intense pressure.
- For existing and future regional agricultural activity to flourish, an adequate supply of land for soil-bound and non-soil bound primary food production activity must be assured. A key requirement, therefore must be the redirection of regional urban uses to available and suitable lands outside the Agricultural Land Reserve.
- Protection of the farmland base is irrevocably tied to the security of farmers and the health of farm communities. Only with the removal of uncertainty related to farm land conversion and erosion of infrastructure can the agricultural community concentrate on managing its land base and business resources to develop food producing opportunities for the long term.

13.8 The Agricultural Land Commission and Golf Courses

Since the change in regulations under the Agricultural Land Commission Act that removed the ability of the Agricultural Land Commission to refuse golf course development within the Agricultural Land Reserve, the agricultural land base has become almost the exclusive focus for new golf course proposals. Most significantly, this focus has been predominantly on high capability agricultural land (that is Class 1-3 with improvements). Ironically, except perhaps with respect to location, these lands are inherently unattractive from a golfing experience perspective. Usually, major expensive land modification is required.

13.9 Land Capability for Agriculture

The Agricultural Land Reserve is based on a classification of land for agricultural purposes. Mineral and organic soils are grouped into seven classes according to their potential and limitations for agricultural use. The soil classification can be modified by such variables as soil moisture capability, adverse climate, salinity and stoniness. For the purpose of this Study the seven classifications are briefly described as follows :-

Class 1.	The land has no or only slight limitations restricting the production of common agricultural crops.
Class 2.	The land has minor limitations requiring good and continuing management practices or the soil supports a slightly restricted range of crops or has both conditions.
Class 3.	The land has limitations requiring moderately intensive management practices or a moderately restricted range of crops or both.
Class 4.	The land has limitations requiring special management practices or a severely restricted range of crops or both.
Class 5.	The land has limitations restricting its capability to produce perennial forage crops or other specially adapted crops.

Class 6.	The land is non-arable but is capable of producing native and/or uncultivated perennial forage crops.
Class 7.	The land has no capability for arable culture or sustained grazing.

13.10 The Concerns and Issues

A great number of concerns associated with the use of agricultural land for golf course and ancillary purposes have surfaced during the planning process. Some of these concerns are identified and discussed in the following paragraphs 13.11, 13.12, 13.13.

13.11 The Availability of Alternate Golf Course Locations

The recent increased availability of agricultural land for golf courses has meant that alternative site opportunities are being ignored. By way of background, over the years the effort of the Agricultural Land Commission and local governments has been to maintain agricultural land in large parcels and encourage property values close to their value for food production. The size of these parcels and the land values are now viewed as factors that encourage the use of lands within the Agricultural Land Reserve for golf courses. The primary factor in increased availability was the change in golf course use regulations under the Land Commission Act. Alternative land areas do exist, and the Agricultural Land Reserve should not be regarded as the only area suitable for the location of new golf courses. The alternative areas are being ignored. Identification of suitable locations, outside of the Agricultural Land Reserve should be encouraged. Golf courses in the non-Agricultural Land Reserve locations would provide valuable recreation and open space contributions over the long term with reduced probability of conflict with adjacent uses.

13.12 Golf Courses and Agricultural Land Reserve Compatibility

Some golf courses, if properly located, can be accommodated in the Agricultural Land Reserve with minimal impact on food production, the land resource itself or the farming community. Lands of lower agriculture capability (Class 4-7) often have the natural landscape characteristics to enable golf course architects to work more easily with the natural terrain and minimize modifications for an overall superior golfing experience. In specific cases, well designed golf courses can serve as effective buffers between agricultural and urban land uses. Adequate recognition must given to impact on adjacent and surrounding farm community.

13.13 Golf Courses are Urban Recreation Uses

Despite a predominantly rural ambience or image, golf course use has been described by some as urban uses in rural clothing. Golf courses, particularly their associated ancillary uses, represent a fundamental non-farm land use change when introduced into an agricultural community. This non-farm use largely serves the recreational needs of the urban population and as such will either displace agricultural uses or reduce options for future food production. Past experience suggests that rural golf courses become a focus for other urban-oriented uses, with subsequent common use change pressures for both recreational and residential uses.

13.14 Potential Impact of Ancillary Use

One of the more serious implications for agricultural use interests is the close relationship between golf courses and associated recreational resort and residential uses. These uses are either part of the initial or of subsequent development plans. Too often, it is assumed that ancillary recreation uses, resort facilities, various commercial and residential use components are the natural evolution of golf course development. The Agricultural Land Commission has advised the Project Team that in a number of cases, established golf courses have eventually applied for residential development, often citing financial problems with the golf course on its own. These associated uses are more appropriately located outside the Agricultural Land Reserve and may require very different locational criteria than a golf course.

13.15 Golf Courses as a Reversible Use of Agricultural Land

Some have taken the view that with the Second World War history of golf course conversion to food production or for other reasons and experiences, golf courses uses are reversible. Depending somewhat on soil characteristics and their modification, from a biophysical perspective, this change from golfing to food production is a theoretical possibility. This reversal of use to food production is highly unlikely for several reasons :-

- Given the level of capital investment associated with the development of a golf course facility, it is very unlikely golf course use would be abandoned in favour of much lower value agricultural use as opposed to other comparable or higher value urban uses. The exception would be at a time of national or similar crisis and would be of a short duration. The land would then revert to golfing or a higher use. In fact, in some cases, this may represent the initial long term objective, particularly if Agricultural Land Reserve lands at cheaper prices is readily available to start the same sequence of development over again.
- It is probable that in the event of financial stress, the options of higher density urban development through the introduction of resort/hotel facilities, expanded recreation options or residential uses in association with the golf course would be the first pursued, which would further reduce the options for reversal to agricultural use.
- Realistically, it is beyond the means of most farmers to purchase golf course land let alone to finance the conversion of a golf course back to food production, including building removal/conversion, terrain/soil modification, drainage and irrigation system changes etc.

13.16 Conflicts and Compatibilities with Management Practices

From the standpoint of both agricultural and golf course management practices, a wide range of actual and potential conflicts and compatibilities exist. Over 80 agricultural commodities are produced in the Study Area, each with its own location requirements and management practices; with a similarly wide range of golf course location, enterprise type and management requirements, the combinations of interface differences are innumerable. Depending upon the agricultural commodity, some normal farm management practices may be regarded as nuisances by adjacent golf course users, even though located in the reserve of land established for agricultural use. Greenhouses may restrict the location of driving-ranges or require specific site design. Likewise, a full 18 hole golf course might well be considered incompatible adjacent to an intensive hog operation with on-site waste disposal. Under normal management practices, on the other hand, a raspberry operation might well be considered a suitable neighbour.

13.17 Negative Impacts

Consultation with agricultural professionals, municipal staff and some farming community representatives and a review of reports, tell us that there is a wide range of direct impacts along the interface of golf courses with farming operations. Concerns with negative impact on use as follows :

- Rural roads that serve primarily the agricultural community and are often frequented by farm equipment become more heavily used when a golf course is located within the farming community.
- Conflicts can arise over limited surface and ground water supply, although some sources expressed the view that golf courses have the potential to help contribute to agriculture's irrigation and drainage costs.
- Irrigation and drainage practices may not be compatible, e.g. intensive golf course irrigation can flood adjacent vegetable and berry fruit crops.
- Crop specific pesticide application requirements, as to timing and rate of application can be in conflict with golf course management and users.
- Potential for isolation of parts of an agricultural unit or enterprise from the remainder of the farming community.
- Fragmentation or isolation of parts of farm enterprises due to golf course development being used as justification for further application for ALR exclusion or further subdivision.
- Livestock waste disposal management issues.
- Impact of normal farm smells and noises, e.g. smell of decaying crops in autumn impacting on the golfing experience or noise from the golf course activities impacting on adjacent livestock breeding.
- Associated recreation uses that increase interface conflict potential with adjacent farm activities, e.g. biking, hiking or horseback riding.
- Implications of urban services extension through the farm area with financial impact on farm operators, which in turn increases demand for non-farm use, subdivision and ALR exclusion along the service corridor.

13.18 Frustrations and Frustration Levels

An example of the frustration that can be felt by food producers is captured in the comments from a Chilliwack public hearing record of a farmer who operates a forage-livestock enterprise adjacent to an existing golf course :-

"I own and operate a farm just south of this golf course here. Basically, we are not against golf courses as such. I am not saying I favour golf course, farmers and

golf courses, I guess do not get along too well. Having said that, the golf course is not my main concern, it is the golfers. For us, we have different reasons what we have against certain golfers. First of all, they seem to overshoot balls. Golf balls make poor cow feed. They tend to foul up our equipment a bit. Another reason is that golfers who do overshoot their targets, seem to think they can reclaim their golf balls. They find holes in the fence or in the blackberries, and get in the field and walk through the grass, whether it is short or tall. Corn, whether is is short or tall, which is rather annoying to the farmer and damages the crops.

Another reason seems some golfers have no problems taking their beverages, full cans and bottles of whatever, take it down to the back of the golf course, but as soon as it is empty they go over the fence and it ends up in our field, which is no good for tractor tires and cow feet, like you can well imagine. As a matter of fact, this fall we made a first round through our corn, and there was a little two-wheeled golf cart right on our corn field.

Another reason, Mr. Moderator, is some golfers seem to think that our field is their washroom. This spring I walked by there and there was paper to prove it."

13.19 The British Columbia Federation of Agriculture and Institute of Agrologists

It is perhaps such concerns with impact potential that led the B. C. Federation of Agriculture, which represents the interests of most of the producer organizations within the study area, to pass the following resolution at the Annual General Meeting in December 1990.

"Whereas golf courses are a permitted use of ALR lands; and whereas golf courses may have negative impacts on adjacent farms; and whereas there is minimal potential to reclaim a golf course for agricultural purposes, Therefore be it resolved that the B. C. Federation of Agriculture recommend that the Order-in-Council permitting the use of ALR lands for golf courses, be rescinded."

In addition, B. C.'s Institute of Agrologists at their 1990 Annual General Meeting passed a resolution requesting jurisdiction for golf course approval in the Agricultural Land Reserve be returned to the Agricultural Land Commission due to potential negative impact on agriculture in the long term.

13.20 Agricultural Community Financial and Stability Considerations

In the absence of clear locational guidelines, golf course development can cause serious agricultural community instability. For the few farmers who want to get out of the business of agriculture, the capital gain of the difference between golf course land value and farmland value is personally very attractive and difficult to resist, even though the land use change may have negative impacts on neighbours who choose to remain in agriculture. Even after the decision is made and purchase options signed, the uncertainty of the situation affects management. For example, two Delta farmers express their dilemmas as purchase options near term on farm properties proposed for golf course course use :-

"Signing another option means signing away another year, and so that cost has to be covered, and unless it is, I have absolutely no interest. I feel like I am renting, I can use my buildings and my land but I can't expand or improve anything.

One of my fields needs extra drainage, and if I put it in, and the arm is sold it is wasted money. But if I don't and it doesn't sell it's wasted time."

And, a second farmer:

"I should be investing more money back into my land, but I don't want to waste it. And even if it does sell, the way prices are going we won't be able to buy anything else."

13.21 Tensions

For the farm community, introduction of golf courses can bring about tensions. While not documented, Ministry of Agriculture and Fisheries staff expressed some concern over longer term social impact of proliferation of golf courses within traditional farm communities. To be blunt, golf courses and the clientele often represent an income status far removed from the standard of living of most farmers. This stark contrast can be further even more marked in those agricultural communities where people from different ethnic and cultural backgrounds comprise the majority of farm owners or farm workers.

13.22 Financial Institutions, Farming and Golfing

With an increasing aura of uncertainty within a farm community, financial institutions may become reluctant to provide financing opportunity for farm improvements because of speculation generated by the possibility of land being converted to golf course use. In addition, farmers themselves begin to question the wisdom of investing in improvements during this period of golf course fever.

13.23 Purchase of Farmland

Purchase of farmland by non-resident interests based on speculation of land use change to golf courses tends to increase instability and negatively influence care of the land. It can also be the motivation for land and water use bylaws that restrict or otherwise control legitimate farm practices. In other words, all too often, golf courses serve as the "thin edge of the wedge" through which other urban uses are encouraged within the Agricultural Land Reserve and legitimate farm use is discouraged. The end result is reduced stewardship of the foodland resource, which, even if it does not result in outright conversion to alternate uses, through time translates into eventual reduction in crop productivity and range of cropping options.

13.24 Federal and Provincial Funding

In some instances, federal-provincial funding has been provided to improve agricultural lands and stabilize agricultural communities, (e.g. drainage and irrigation systems). One could question the appropriate transference of these intended agricultural benefits to golf course developments.

13.25 Summary

In summation, a member of the Study Area farming community involved with a golf course development option put it succinctly :-

"It should be made clear that there is a place for golf courses, but we have to preserve farmland as much as possible or down the road we will leave ourselves with all the mediocre land, and they'll be golfing on the prime stuff."

13.26 Conclusions

As the Study Area develops to meet the population growth, the pressures on agricultural land and the farming community will increase. The pressure is not just from golf course development, although the golf course is a great consumer of land area. Since the Order-in-Council, the pressures for the approval of golf course development have been placed on municipal councils. However, the mandate of a council and the position it may take on golf course or any other development can change with some frequency, as has been seen at recent elections. Likewise, their mandate reflects local interests and concerns rather than the broader interests and concerns of the region or the province. The Agricultural Land Commission, on the other hand, has had a provincial mandate that it has met with some consistency since the early seventies. Based on the number of golf course applications approved by the Commission, there is little evidence to suggest that their decisions have not been objective and based on the protection of higher quality farm land and the farming community. The fundamental criticism of the Commission is and has been that their mandate is focussed entirely on a single land use, agriculture.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

14.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS FOR ADJACENT & COMPETING WILDLIFE & FISH HABITAT

14.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS AND IMPLICATIONS FOR ADJACENT AND COMPETING WILDLIFE AND FISH HABITAT

14.1 Introduction

Next to agriculture, many believe there is substantial impact from existing and future golf course development upon habitat for fish, birds and small and large mammals. The Study Area contains significant areas of prime and even critical habitat for a wide range of species and concerns have been expressed by many community groups. With the degree of urbanization that has already taken place, particularly within the highly productive and ecologically sensitive Fraser River delta portion of the study area, wildlife habitat is already considered by some to be a severely diminished resource. With continued population growth within the region, the implications of further depletion of habitat must be weighed against the contribution of wildlife and wildlife habitat to the ecological, economic and social well being of the region.

14.2 Nature and Natural Areas

There is increased public interest in nature and "natural areas", and with over 200 bird species regularly frequenting the delta to the Fraser River and possibly 90 more occasional visitors. Wildlife viewing, particularly bird watching, is an important and rapidly growing recreational activity for both residents and tourists.

14.3 The Agencies

Three agencies share responsibilities to protect wildlife habitat and populations within the study region :-

- The Government of British Columbia, Ministry of Environment (MOE)
- Canadian Wildlife Service (CWS) of Environment Canada
- Fisheries and Oceans Canada (FOC).

In general, these agencies do not oppose golf courses but each have expressed their concern regarding conversion of habitat and added the qualification that impact, whether immediate or longer term, is dependent upon the number and type of golf course developments, size of the land area, level of use and most importantly, the location relative to wildlife habitats.

14.4 Displacement of Habitat and Golf Course Design

It is also recognized that, while in many cases golf course development results in the direct displacement of habitat, site design can be an important factor in terms of minimizing habitat damage as well as presenting opportunities for habitat restoration and enhancement. Species requirements range widely, however, and developments that may favour or create habitat for some species will invariably preclude or destroy habitat for other species.

14.5 Fisheries Habitat : Negative Impacts

Fisheries and Oceans Canada has a goal of "no net loss" of fisheries habitat. Any proposal adjacent to, or with the potential to impact upon fisheries habitat is of concern. In those portions of the Study Area presently still forested, any clearing for golf course or other development will alter water run-off patterns and therefore bring about habitat changes. In the absence of specific studies, there is also the uncertainty of the specific value of the fisheries resource and the impact of the drainage systems that are subsequently put in place as part of the golf course development. In a recent proposal for a golf course in Coquitlam, for example, in an area thought to be one of the highest fish use areas in the region, agencies are opposing the application until a comprehensive survey can be carried out.

14.6 Fisheries Habitat : Positive Impact

Conversely, and in keeping with the Fisheries and Oceans Canada goal to restore destroyed habitat for "net gain", golf course development can be an opportunity for habitat enhancement. In situations involving conversion of abandoned farmland to golf course use, for example, from a fisheries habitat perspective, conversion can be an opportunity to stabilize streambanks, including introduction of vegetation buffers to improve water temperatures and filter chemical contaminants before they reach the water course. Depending upon type of farming and level of management, conversion of golf course use can introduce more sophisticated drainage and waste management systems that substantially improve fish habitat.

14.7 Potential Conflicts

In terms of potential conflicts between fish habitat and adjacent golf course use, there are two main concerns - water supply and water quality. Properties that already include small water bodies, creeks or streams are particularly attractive to potential golf course developments. However, this kind of development can result in direct competition for water. Even within the relatively humid climate of the study area, golf courses are significant water users. In their preliminary response to a proposed golf course proposal in the Fraser Valley, for example, fisheries agencies expressed concern at the proposed use of an adjacent creek rather than municipal water. The volumes required would apparently have had serious impact on summer flows, already low enough to be of concern to fisheries management.

14.8 Water Quality

While certainly not specific only to golf course development adjacent to fish habitat, water quality concerns stem from several sources, including impact of fertilizer and herbicide use, sedimentation during construction and sewage treatment and liquid waste management during operation. At least historically, the perception has been that golf courses have used more fertilizers and herbicide, particularly fungicides, than other land users. Some of this appears to be changing and many golf course superintendents claim the introduction of management programs to reduce these impacts. Nor should it be forgotten that these chemicals are also used by the farming community. Potential impact upon adjacent fish habitat can vary, however, not only depending upon volume of chemicals used but also soil permeability, toxicity, persistence and mobility of the particular chemicals used. While to the best of the knowledge of the Project Team, no current studies are being conducted specifically on the impact of golf courses upon fisheries habitat. Along one creek in south Surrey there is concern (but no data), that the fish kill occurring each year may be related to the number of golf courses located along its length.

14.9 A Caution

Fisheries habitat is particularly vulnerable during the golf course construction stage, with particular concern related to sedimentation. Also of concern are the location and timing (season) of construction of stream crossings by roads, services or fairways.

14.10 Birds and Habitat

As a critical stopover for migratory birds along the Pacific Flyway, the Fraser River delta is of international significance. The incredible diversity and number of birds that nest or winter in the area are not only dependent upon the wetlands but also upon the adjacent agricultural lands. Within the Boundary Bay ecosystem, for example, a recent progress report of a current joint Canadian Wildlife Service (CWS), Ministry of the Environment (MOE) baseline study summarized the dependence of birds upon continued agricultural use of the lands inside the dykes :-.

"Up to 100,000 ducks, 50,000 shorebirds, and about 100 raptors were counted on one day on the beaches of Boundary and Mud Bays. Nearby farmlands were used by many of these birds for food and shelter, (Estimated at 27,000 ducks by day and 48,000 at night). The distribution of many species in the Boundary Bay ecosystem is closely associated with the distribution or suitable farmland habitats near Boundary and Mud Bays."

This fact is particularly relevant because these are the very landscapes that are under pressures for further golf course development.

14.11 Competition for Land Area

By far the most serious implication for waterfowl habitat within the study area is outright competition for land area and the direct alteration and destruction of bird habitat. While an argument can be made that golf courses can create habitat for certain species, the kinds of habitat that golf courses provide are not those in short supply within the study area. Moreover, the species that are attracted to golf course greens and fairways, namely grazers such as wigeons and Canada geese, are not the species whose populations are under pressure. According to Canadian Wildlife Service, one of the species of greatest concern along the Pacific flyway is Northern Pintails. Their numbers have been steadily declining and as eaters of seeds and insects they are dependent on farmlands including some land which is the subject of several golf course proposals.

14.12 The Longer Term

In the longer term, continual erosion of habitat by golf courses can impact negatively upon other users as well. As present habitats are decreased, birds must seek alternative feeding areas. Not only can this result in increased stress upon the birds through travelling additional distances inland, reduction of existing habitat adjacent to the foreshore can transfer pressure to other farmlands, resulting in crop damage through increased use by birds.

14.13 Negative Impacts on the Golfing Activity

Species that are compatible with golf course development can also detract from the golfing experience. Creation of small waterways, as part of golf course development, can increase habitat and provide quick refuge from golfers for birds from golfers. In one Delta golf course the artificial lake that was created is estimated to be used by some 500 to 600 waterfowl. These same waterways create problems for golf course management in terms of bird excrement and enhance habitat for nuisance insects such as mosquitoes. Further conflicts can arise when golf course managers choose to use such devises as scare machines to diffuse wildlife from fairways in areas of prime waterfowl habitat.

14.14 Use of Chemicals

A current CWS study is surveying the numbers of birds on eight golf courses within the study area. Questionnaires have been sent to 78 golf courses across the Province, focussing on the use of turf care chemicals, the effects on birds and other wildlife and the estimated numbers of wild animals and birds inhabiting golf courses. While the study will not be completed until March 1991, preliminary results suggest that golf courses in B.C. appear to use much less chemicals than their counterparts in the U.S. and that impact of chemical use upon wildlife and habitat may not be as much of an issue as thus far assumed.

14.15 Breeding and Nesting Sites

Location of golf courses in the vicinity of breeding and nesting sites are of particular concern related to such species as owls, osprey and herons. While potential impact is not limited to golf course use, the extreme sensitivity of breeding/nesting areas to the presence of people makes uses such as golfing highly incompatible.

14.16 Golf Course Design and Habitat Loss

Golf course design can greatly influence the degree of impact on bird habitat. While new "link" courses are considered less negative than traditional design and retention of "roughs", brush understory and tree clusters can benefit wildlife, there is concern within the agencies that not enough is known to determine if such mitigative measures will be enough to adequately compensate for habitat loss.

14.17. Habitat for Mammals

Little information was available through discussion with agency staff related to impact or potential impact of existing or proposed golf course development on habitat for mammals. Subject of a current Ministry of Environment (MOE) study and perhaps the most specific concern is the impact upon habitat for small mammals such as voles, which are a primary food source for raptors. Voles prefer ploughed or old fields. Golf course development would constitute a threat to vole habitat and, therefore, the maintenance of raptor populations. On the positive side, within the upland areas of the region, golf course development can enhance edge effect for certain large mammals and upland game birds. Given the diversity of land use in the region, this edge effect is not considered a limiting factor to wildlife populations. For the most part, impact is more negative on golf course management as such developments tend to attract nuisance wild life such as bears, deer and raccoons.

14.18 Conclusions

Concern over the impact of golf course development on habitat and wildlife has led to action by community groups and the government agencies. These actions have been sufficient to make municipal councils think again about golf course applications. The low number of approvals of golf course applications can in part be attributed to the actions of community groups.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

15.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS & IMPLICATIONS FOR ADJACENT URBAN, SUBURBAN, RURAL RESIDENTIAL, RECREATIONAL OPEN SPACE, URBAN EDGE SPACE, WILDERNESS LAND USES & PROTECTION OF ECOSYSTEMS

15.0 GOLF COURSES : COMPATIBILITIES/CONFLICTS AND IMPLICATIONS FOR ADJACENT URBAN, SUBURBAN, RURAL AND ESTATE RESIDENTIAL, RECREATIONAL, OPEN SPACE, URBAN EDGE SPACE, WILDERNESS LAND USES, AND PROTECTION OF ECOSYSTEMS

15.1 Introduction

This chapter discusses the relationship of golf course development to various other kinds of land use, particularly uses at the edge of urban development. Earlier in the Study (Chapter 11), the use of golf course development as a transitional area between urban and other land uses has been seen to be a benefit. This is reinforced in this chapter with consideration given to the specific kinds of land that may be either side of the course. Against the benefit and specific to this chapter, is the potential for golf course activities and management practices to impact wetlands and other sensitive ecosystems.

15.2 Urban, Suburban, Rural and Estate Residential

These residentially oriented uses are for the most part compatible with golf course use, although perhaps less so in the rural parts of the study area. The challenge is to effect site design that combines enhanced open space with associated or adjacent residential uses. Developing urban areas may require policy adjustments to allow residential density averaging over both golf course and residential components of any proposal. In the case of rural residential and estate residential uses, which are rapidly expanding within the rural portion of the study area, it is more a a matter of positive impacts of improved access to amenities and infrastructure associated with a golf course development and the negative impact of increased intrusion of more people and reduced privacy.

15.3 Recreation and Open Space

While most recreational uses are considered compatible with golf courses as a component of a range of urban and rural recreational experiences, there is also potential for direct conflict with specific kinds of recreational use. Wildlife viewing, including wildlife-based site activities such as game farms, could be impacted because of noise and a constant presence of people, especially if associated uses such as tennis courts or convention facilities are part of the golf course development. Recreational hunting of game birds, as well, would also be a concern as an adjacent land use, both from a noise and a safety perspective.

15.4 Protection of Pocket Wilderness and Old Growth Ecosystem

Increasing awareness of urban edge old growth and interest in protecting pocket wilderness areas has stimulated major concern with at least one golf course proposal. The public sensitivity to protecting these environments suggests that golf course use is considered incompatible and proposals are likely to meet strong resistance. Even if the golf course development is only adjacent to such areas, its very presence may be seen to interfere directly with the pocket wilderness experience and indirectly, through attracting more people due to improved access to and awareness of urban edge wilderness or old growth forests.

15.5 Community Watersheds

Increasing public concern with water quality makes consideration of integrated golf course-community watershed use impractical. Any potential for contamination of surface and ground water, increased turbidity or other considerations about water quality would be deemed unacceptable. In addition, increased access of people to areas whose integrity is dependent upon minimal human access would make watershed management more difficult.

15.6 Conclusions

Concerns over golf course impact on ecosystems have be voiced, usually after development applications have been made. Concerns over impact on residential areas have been heard but are mitigated to some extent by the increase in land value because of proximity to the golf course. An application should initiate a systematic assessment of environmental issues. Surveys and analysis will help determine if the land can be developed at all or what steps have to be taken to meet concerns over environmental impact.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

16.0 OBJECTIVES OF GOVERNMENTS

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16.1 Introduction and General Remarks

Chapter 12.0 described the situation at the municipal level of government. This chapter briefly reports on other governments and government agencies. Golf course development involves a multitude of government agencies and some applicants have failed to comprehend the magnitude of statutory and other requirements. Governments and government agencies have taken an active interest in golf course development for reasons from environmental impact to opportunities for economic development. As part of this Study, discussions were held with representatives of government agencies which have an interest in the subject. Their comments and positions are referred to throughout the report and are now described.

16.2 Regional Districts

Prior to 1983, regional districts in British Columbia had planning authority. Since then, land use planning has been entirely in the hands of municipalities through the establishment of Official Community Plans. Regional districts have, therefore, taken on a role of seeking planning frameworks for regional development, acknowledging that municipal actions, which respond to local issues and concerns, may not ensure implementation of a regional strategy. In the case of the Greater Vancouver Regional District, this has led to a strategy document called "Creating our Future : Steps to a more livable region". The report, adopted by the GVRD Board in July 1990, presents the changes and choices that face the region. It recognises the contradictions that emerge as a region grows, such as increased use of automobiles against the concern over the quality of the air we breathe. It gives context to municipal and individual actions that will make for a more livable region. Specifically, the strategy emphasises the need to conserve the land resource, and maintain a healthy environment and economy, in a time of substantial growth. It shows the opportunity to create regional centres, separated by green areas and linked by improved transit and transportation systems.

16.3 Government of British Columbia, Ministry of Agriculture and Fisheries

The Environmental Assessment component of the Ministry business plan identifies Ministry interest regarding the limitations on the natural resource base, changing demographics and new production methods. The Ministry indicates under general implications regarding the natural resource base that :-

"Limitations on the resource base and changing demographics such as the continuing shift of population from rural to urban areas will cause resource-use conflicts to become more frequent and intense. The Ministry will be asked to intervene in inter-sectoral disputes."

The Project Team found no specific Ministry position or policy on golf courses or their association with agricultural use. Ministry professional staff, who were contacted, expressed strong concern regarding potential impact of the proliferation of golf courses within the agricultural community.

16.4 Government of British Columbia, Agricultural Land Commission

The Commission now has no power to control the entry of golf courses into the agricultural environment. They see this as a major long-term problem for the viability of all agricultural land. Their concern is in part about the first wave of development but is also a concern regarding subsequent development. From their experience, the introduction of golf courses de-stabilizes the agricultural community. Their concerns should be read in conjunction with information in Chapter 13.0.

The Commission believe they have met their mandate and performed well between 1978 and 1988 under the old guidelines. During that time they allowed two-thirds of all golf course and driving range applications, directing them to marginal agricultural land capability locations. Since the change in regulations, they note that applications have shown little or no discrimination for the quality of agricultural land or the sensitivity of the local situation. They also believe there is still plenty of land located outside the Reserve which is suitable for golf courses, but that it is higher priced because of this. The Commission have documented this alternative land area in a recently published study "Non-farmland with long term urban potential in the Lower Mainland". Many of the proposed developments within the Reserve they regard as primarily land speculation. Their opinion is that golf courses have many negative effects on the agricultural process. Some of their concerns are practical and relate to the physical intrusion of people on farming activities and the paraphernalia of golf found by farmers on their fields. Other concerns are more about the future of farming and fears for the viability of the farm as a unit and as a way of life.

They believe that the return of land from golf use to agriculture is not possible given the level of additional capitalization and its effect on the price of land, and because all growth forces will be moving the land to some 'higher and better' use. They see this scenario as the often unstated long-term objective of the developer, and that golf course developments are set up with the intention of failure or with little concern to make the developments succesful.

Their perception is that certain agricultural operations such as crop spraying are not compatible with golf operations Their experience is that the introduction of golf courses into an area makes financial agencies more hesitant to grant farmers loans for capital improvement. In addition the Commission is concerned regarding the conversion of land from agriculture which has had considerable public investment through Federal-Provincial grant programs such as soil upgrading.

They wish to see a comprehensive long-term approach to golf course development which protects the long-term viability of agricultural operations.

16.5 Government of British Columbia, Municipal Affairs, Recreation and Culture

The Ministry regards the development of golf in the Study Area as a regional matter and as such has no formal position or interest in it. The Sport and Recreation Division is responsible for the development of sport at the provincial level and recognize that the lack of facilities is a factor inhibiting the growth of many sports, including golf. The Division also wishes to encourage the junior development of golf in concert with the two provincial organizations, the BCGA and the CLGA - BC Section. It recognises the economic value of sport, particularly in the financial benefits form the hosting of sporting events and would like to see major golf facilities developed which would allow such hosting; it is in this respect that they have been supporting the PGA/TPC initiatives.

16.6 Government of British Columbia, Ministry of Economic and Regional Development

This Ministry recognises the role of golf as part of a tourism development strategy, and supports the position of the Ministry of Tourism The concept of golf courses as employment generators is also supported and encouraged.

16.7 Government of British Columbia, Ministry of Tourism

This Ministry is pursuing a golf development strategy as outlined in the section on Golf Demand (Chapters 4.0, 5.0, 6.0 and 7.0). The Ministry will be conducting a major market analysis in 1991 to identify precisely the size and potential of the tourism demand.

16.8 Fisheries and Oceans Canada

In meeting its goal of protecting fish habitat and as noted earlier, Fisheries and Oceans Canada applies the principle of "no net loss" to new developments and undertakings (including golf courses). This is to ensure that habitat productive capacity is maintained. In addition, efforts are made to restore previously altered or destroyed habitat and to develop new habitat for a "net gain" of habitats for selected fisheries.

16.9 Conclusions

This Study has crossed municipal and regional district boundaries. Golf course development is not simply a municipal matter. Municipalities have produced planning studies based on the profiles of their municipalities with, understandably, little attempt to look at the wider picture. Indeed, there is another reason for this Study of golf course development over a larger area. Golf course development is not presently part of any provincial or regional planning strategy.

There is the requirement for a coordinated Study Area plan for golf course development. It would involve the golf course industry, the tourist and real estate industries among others, the Agricultural Land Commission, environment agencies and all levels of government. Such a plan will offer the developers, the municipalities, the region, the Agricultural Land Commission and others a framework within which they can all work. The plan will cross regional and municipal boundaries.

The onus is on the golf course applicant to know what impact the proposal may have or may not have on the environment and what is required to meet statutory requirements. This understanding is confused by the number of agencies that have to be included in the environmental assessment.

Because of the profusion of bureaucracies, from the perspective of the developer, applications need to be processed expeditiously by all approving authorities. From the view of the bureaucrats, applicants play one authority against another. This Study, in Chapter 12, has described the differences in municipal requirements. It noted that golf course proposals, particularly in unorganized territory, face lesser requirements than elsewhere. While the applicant has responsibilities, there must be an information process that brings an awareness to the developer and the community about the ramifications of a proposal with regard to federal, provincial, regional and municipal legislative requirements.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

17.0 RESPONSE FROM COMMUNITY GROUPS AND OTHERS

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17.1 Letters to Community Groups

Letters were sent to the following community and other agencies at the request of the Client :-

B. C. Institute of Agrologists
Vancouver Natural History Society
Delta Farmers' Institute
UBC Real Estate Corporation
Southlands Community Committee
Boundary Bay Conservation Committee
Urban Development Institute
B. C. Waterfowl Society
The Greenfields Project
B. C. Federation of Agriculture
Burns Bog Conservation Society
Friends of Cypress

One written submission has been received from the Boundary Bay Conservation Committee. It is included as Appendix Exhibit "C". The B. C. Institute of Agrologists were also contacted during the course of the study.

17.2 Meetings

After the above noted letter was received, the Project Manager met with the Friends of Cypress, and the Burns Bog Conservation Society, and the Urban Development Institute. During the course of the Study, meetings have been held with representatives of the business community, golfing industry, and golf course owners and operators. Some of their opinions and remarks are incorporated into this report.

17.3 Comment and Conclusion

The limited response to the letter does not reflect the vigour with which golf course proposals have been critiqued and opposed by community groups with a range of interests. This opposition, which covers a broad spectrum of concerns, has been eloquent and forthright. It has had an impact at the ballot box. The opposition to golf course development has been clearly expressed in places of completely different terrain as Delta and West Vancouver. Many of the concerns are about subjects reported throughout this Study.

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GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

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18.0 BALANCING SUPPLY AND DEMAND

18.0 BALANCING SUPPLY AND DEMAND

18.1 Introduction

This chapter is the basis for a regional plan. It focuses on the interrelationship between the current supply and demand for golf courses in the Study Area, and the impact of increasing demand over the next 25 years. It proposes certain increases in supply and reviews the impact that these increases would have on satisfying the demand. This review is carried out firstly at the regional scale and then at the sub-regional scale. Suggestions are made in the sub-regional analysis regarding other factors which should be considered in planning golf development, and these factors are further discussed at the end of the chapter.

18.2 Regional Balance of Supply and Demand

The current supply of courses in the Study Area is 66 existing courses, with 8 approved for construction as of December 31, 1990.

The demand situation for recreational golf has been assessed using various methods and the Study Team's best estimate of projection, after considering all methods, for the future for recreational golf is as follows :-

	Population	Golfers	Rounds
1986	1,550,000	160,000	2,850,000
1996	1,975,000	223,000	4,000,000
2011	2,518,000	318,000	6,000,000

The ratios of golf courses to population, golfers and rounds played in 1990, based on the supply of 66 courses, were as follows :-

• Population per course	23,485
• Golfers per course	2,424
• Rounds played per course	43,182

If it were required to construct new golf courses so as to maintain these ratios, the required number of courses for 1996 and 2011 would be as follows :-

	1996	2011
Using population per course	84	107
Using golfers per course	92	131
Using rounds played per course	93	139

While many factors influence the rate of growth of demand for recreational golf, in the opinion of the Project Team the demand from the residents of the Study Area can be satisfied by the creation of an additional 19 courses. The further addition of five courses for tourist golf will bring the total number of Lower Mainland golf courses to 90 by 1996. It is estimated that an additional 24 courses for recreational golf will be required to meet the demand between 1996 and 2011 and a further 5 courses will be needed to meet tourism demand for a total of 119 courses by

the year 2011. The establishment of these courses will also meet the demand for tournament golf.

Eight courses in the Study Area were approved for construction at December 31st. 1990. To meet the demand in 1996, a further 16 courses, in addition to those approved for construction, will have to be built by 1996. There are no statistics that can be reported on the demand for driving ranges.

In summary, the supply and demand in the Lower Mainland is as follows :-

- Existing courses, 1990 : 66
- Additional recreational courses required by 1996 : 19
- Additional tourism courses required by 1996 : 5
- Total number of courses required by 1996 : 90
- Additional courses therefore required by 1996 : 24
- Courses approved for construction, December 1990 : 8
- Additional courses required for construction by 1996 : 16
- Additional courses required between 1996 and 2011 : 29
- Total number of courses in the Lower Mainland in 2011 : 119

The impact of the construction of this number of courses on the ratios outlined above is shown as follows :-

	1986	1996	2011
Population per course	23,485	21,944	21,160
Golfers per course	2,424	2,477	2,672
Rounds played per course	43,182	44,444	50,420

18.3 Sub-regional Balancing of Supply and Demand

While the population being served by each course will theoretically decline, the increased number of golfers and the additional rounds each will play, will cause the usage of each course to rise. This is the average situation across the Study Area. The situation in each sub-region will vary depending on the current supply and the likelihood of it changing over the study period. The likely future supply by sub-region is expected to be as follows :-

	Current	1996	2011
Sub-region #1	23	25	27
Sub-region #2	8	12	16
Sub-region #3	19	29	41
Sub-region #4	6	10	16
Sub-region #5	10	14	19
Total	66	90	119

The following comments can be made about each sub-region, which are shown on Drawing One : Sub-regions and Districts:-

Sub-Region #1 - Urban Core

- Currently there is a ratio of population to courses of 36,632, which is over 60% higher than the regional average of 23,845.
- Even if the number of courses increase to 27 by 2011, the ratio will increase to 43,700 people per course. This will exceed the study area average by almost 100%.
- The sub-region's golf demand will have to be met in other sub-regions.
- This implies an increased travel-to-golf distance for sub-region residents.
- Every effort should be made to maintain the existing courses.
- Every effort should be made to encourage the development of new courses.
- There is considerable scope for a municipality to become involved with the development of new golf courses, as is happening in Burnaby.
- Courses which use less land, but which are of a high quality should be encouraged; in this regard, the executive courses and the challenging 9-hole regulation courses are models which should be explored.
- Golf 'centres', consisting of a driving range, practice greens and three regulation holes, should be encouraged.
- Courses should be encouraged as part of major residential developments.

Sub-region #2 - North Shore/Whistler

- Currently there is a ratio of population to courses of 20,522, which is lower than the regional average of 23,845.
- The addition of 8 courses by 2011 would reduce this ratio to less than 15,000.
- However several of the courses will be in the Squamish/Whistler area, of marginal accessibility for North Shore residents.
- Every effort should be made to encourage the development of new courses on the North Shore.
- There is considerable scope for the municipality to become involved with the development of new golf courses, as is happening in Burnaby
- Courses which use less land, but which are of a high quality should be encouraged close to the population centres on the North Shore; in this regard, the executive courses and the challenging 9-hole regulation courses are models which should be explored.
- Full size, regulation courses should be encouraged in the Squamish area, to serve both the Whistler resort and the population on the North Shore
- Golf 'centres', consisting of a driving range, practice greens and three regulation holes, should be encouraged on the North Shore.
- Courses should be encouraged as part of major residential developments.

Sub-region #3 - Valley South

- Currently there is a ratio of population to courses of 18,180.
- Even the addition of 22 courses by 2011 would only cause this ratio to decrease to 16,340 people per course; this will not make it easy for the sub-region to absorb any increased demand that will come from the Urban Core sub-region.

- Given this factor, the development of courses should be allowed beyond this figure, if the core sub-region does not reach the level of course development outlined above (25 by 1996, 27 by 2011).
- Provision of courses on the western and northern edges of the sub-region, and close to major transportation routes should be encouraged.
- Full size, regulation courses should be encouraged to serve both the tourism market and the local recreational demand.
- Courses should be encouraged as part of major residential developments
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.
- A study of the degree to which Burns Bog sanitary land fill, could provide additional courses in the medium and long term, should be undertaken.

Sub-region #4 - Valley North

- Currently there is a ratio of population to courses of 11,582.
- The addition of 10 courses by 2011 would see this ratio decrease to 9,280 people per course.
- This sub-region has considerable scope to absorb additional demand, given its proximity in terms of time to the expanding municipalities of the Urban Core Sub-Region.
- Course development should be particularly encouraged in the western part of the area.
- Full size, regulation courses should be encouraged to serve both the tourism market, the local recreational demand and demand from the core sub-region.
- Courses should be encouraged as part of major residential developments.
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.

Sub-region #5 - Valley Central

- Currently there is a ratio of population to courses of 12,842.
- The addition of 9 courses by 2011 would see this ratio change to 13,890 people per course.
- This sub-region has considerable scope to absorb additional demand, but proximity to the transportation corridor of Highway #1 is critical to serving demand from the Urban Core sub-region.
- Caution should be exercised regarding the development of courses away from this corridor, especially if they involve major infrastructure investments. The expanding population base of the sub-region will, by 2011, only support the present number of courses. Therefore any major new courses must be oriented to demand from outside the sub-region - either recreational golfers from the other sub-regions, or the tourist market.
- Courses should be encouraged as part of major residential developments, but only after the demand from outside that residential area has been assessed.
- Courses should be encouraged which meet the range of social needs, with both public and semi-private courses being provided.

18.4 Other Locational Factors

Balancing supply and demand across the region and in each sub-region is only the mathematical side of this planning exercise. It is also required to provide guidance on other factors which should be considered when reviewing applications for golf courses and facilities. These items have been mentioned in the sub-regional analysis, but will be commented on in more detail in the remainder of this chapter.

18.5 The Public Need and the Municipal Obligation

Elsewhere in this report there is a commentary on the changing economics of developing a golf course. In addition much of the concern generated by golf course development stems from its private sector orientation and a feeling that there is a lack of commitment to the long haul. This can be overcome, and the economics of running a course made easier if there were public sector involvement in its development. In addition it can be argued that the provision of recreational opportunities is a municipal obligation, just as much as providing swimming pools and arenas.

18.6 The Shorter Course

As golfers age they will appreciate the benefits of shorter course golf. Not only do these courses meet the needs of seniors but they also serve beginners and women players. They are also less land intensive than regulation courses. When these courses are added to the pitch and putt and driving ranges they provide a continuity of service which the industry should be promoting and which golfers have every reason to expect. Shorter courses also serve to take the pressure off the regulation courses, allowing them to serve better the experienced golfer. This concept is not addressed further in this report.

18.7 The Private Course

The private courses in the Study Area are the most sought after by golfers; they have long waiting lists for membership, even with initiation fee levels which have rapidly escalated in recent years. The demand for these courses comes from two sources: firstly a desire to play golf on some of the finest courses in the world, since they are both challenging and immaculately maintained; secondly a desire for an exclusive prestigious private club with untold social cache. There is of course no way of separating these two demand elements - that can be left to the private entrepreneurs as they consider whether golf developments should be private, semi-private or public.

18.8 Future Demand for Private and Semi-Private Clubs

However it is worth commenting on the likely future demand for such private or semi-private clubs. There are two socio-economic trends which will likely increase the demand for such clubs and the role that these clubs play in the family life of Study Area residents. The first is an increase in disposable family income and a greater separation of high and low income families. This trend has fueled the drive for more exclusivity in all products, and golf is no exception. The second trend, which is linked to the first, is the increased number of women in the workforce, and the need to develop mechanisms for family maintenance, from eating to childcare. At lower income levels this need is met in part by the public recreation system, while at higher income levels it is met through the private club. This is more true of the urban clubs, but a niche exists to blend such clubs with shorter courses in the more exclusive areas of the urban fringe.

18.9 Golf Courses as an Attractor of Development

One other aspect of the golf club should be mentioned - its role as an attractor of industrial/commercial development and of the specialists who fuel such growth. All studies of industrial location since the 1960s have emphasized the psycho-social aspects of the industrial location decision - and the golf course plays a critical role in this process. This is also reported in section on golf course benefits (Chapter 11.0).

18.10 The Challenging Course

All the studies reviewed for this report stressed the need to develop courses which challenge golfers without scaring them, and then ensuring that their maintenance was kept at the best possible level. The creation of these top quality courses in accessible parts of the region should be a priority. It is in this area that the demand for a quality golfing experience on a challenging course coincides exactly with the needs of the tourist golfer.

18.11 Real Estate and Resorts and the US Experience

There will be considerable problems in developing golf resorts in accessible parts of the Lower Mainland, although there are some sites available which will meet all the locational criteria. The contribution that these golf resorts will make to both the local economy and to the quality of life of the region's golfers is enormous. These resorts will be heavily land intensive especially if a major championship course is included. They also need to be strategically located close to transportation links, especially road and air. There is no doubt that the US trend of developing golf courses in conjunction with major housing and real estate developments has a place in the urban growth of the Study Area. However the US experience also cautions us in this regard. The courses which have been developed simply as a marketing ploy for real estate have often not been successful. The key to the development is establishing a broader market for the course, and this requires that it be located in concert with an overall regional development strategy. In addition such courses must be regarded as an urban or suburban land use, not a rural one. Their planning should be part of the overall strategy to accommodate and service the region's 2011 population of 2.5 million people

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

19.0 LOCATIONAL CRITERIA

19.0 LOCATIONAL CRITERIA

19.1 Introduction

Some municipalities have prepared locational criteria for golf courses. Once again, Delta, Surrey and Langley have done commendable work on the subject. This chapter offers insights into locational criteria and draws on the work of those municipalities. The work of these three municipalities is recommended for inclusion in the book collections of all municipal planning offices. This chapter, like Chapter 18, can be related to the development of a regional plan.

19.2 Location of Course by User

One measurement of an optimum location relates the golf course to the office or home location of the users. Based on a time estimate of the golfer's preferred length of journey in "off-peak" times, the location may be determined as follows :-

- Executive course : 1/2 hour from office or home location
- Private course : 3/4 hour from office or home location
- Semi-private/public course : 3/4 hour to 1 hour from home location
- Tourist course : 1 hour plus from Vancouver International Airport
- Driving Range : 1/2 hour from home location

In the case of Vancouver International Airport, the journey may be by air to a feeder airport. An hour of flying time, of course, takes the golfer out of the Study Area. It could also be said that a Lower Mainland feeder airport (Chilliwack, Pitt Meadows, Langley, for example), within one hour of flying time can be served from the Seattle/Tacoma Airport in Washington State.

19.3 Off-Peak Times and a "Commuter shed".

A majority of golf course users travel by car. As noted above, the preferred length of time taken to travel to and from the course is a key to course location. The average speed of the journey determines the distance. Typical examples of "off-peak" distances travelled per hour by automobile in 1990 in the Study Area are as follows :-

Suburbs generally	65 km
Burrard peninsula	30km-40km
Surrey area	60km-70km
Maple Ridge area	70km-80km

Traffic planners refer to a "commuter shed", focussed on Vancouver, with a 50 to 60 minute travel time on either side of the City. This can be visualised as a journey from Vancouver to Squamish or Vancouver to Abbotsford. It is assumed the journey is predominantly on a provincial highway. A journey predominantly on a "municipal" street system will reduce the distance travelled in an hour to at least 95% and approaching twice that time at peak periods. As the Study Area development densities increase, commute times will get longer. Recommendations for development to meet the emerging transportation demands are contained in a series of planning documents initiated in 1988 by the Minister of Transportation and Highways.

19.4 Traffic Models

There is no known traffic model for golf courses. Other large area land uses such as regional shopping centres can be assessed for parking and traffic requirements through established gravity feed models. The parking demands of shopping centres are well understood. Even at peak periods, golf courses do not generate anything like the same number of trips as a local shopping centre. The nature of the game spreads the traffic load. A PGA Tournament Course may well require a traffic study similar to that of a shopping centre.

19.5 Highways and Streets

Proximity of the golf course to a highway is a locational benefit. Based on this criteria, golf courses might be sited with proximity to the following access highways and streets in the Study Area, controlled by the Ministry of Transportation and Highways :-

No.1	Trans-Canada Highway
No. 1A	Fraser Highway
No. 7	Lougheed Highway
No. 7A	Barnet Highway
No 9	Bridal Falls - Harrison Hot Springs Highway (Route 1 - Route 7)
No. 10	Ladner - Livingston Highway and Bypass
No. 11	Mission Highway
No. 13	Aldergrove - Bellingham Highway
	County Line Highway
No. 15	Pacific Highway
No. 17	Tsawwsassen Highway
No. 91	Annacis Island Highway
	Richmond Freeway
No. 99	Vancouver - Blaine Freeway
	Sea to Sky Highway/Upper Levels Highway
No. 99A	King George Highway
	Carvolth Road (200th. Street), Langley
	Cypress Bowl Access Road
	Ferry Approaches
	Gaglardi Way
	Knight Street
	Mary Hill Bypass
	Sea Island Way
	Pemberton - Lillooet Highway
	Port Mellon Highway
	Ridley Island Access Road
	Rosedale - Agassiz Bypass Highway
	Taylor Way
	Marine Drive, West Vancouver

19.6 Locational Criteria as Questions

It is recommended that a systematic approach be taken to evaluating locational criteria as it may suit each municipality. The following list, which is a summary of points reported to or reviewed by the Project Team, should be used by the applicant and the approving authority as a series of questions to test the appropriateness of the golf course location :-

- What is the distance and time from the market served ?
- Is the proposal central to a perceived residential or other catchment area ?
- Is the proposal a component of housing development ?
- Is the proposal a component of recreational development ?
- Is the proposal a component of commercial/industrial/tourist development ?
- What is the adjacency or proximity to an existing or future highway ?
- What is the adjacency or proximity to an existing or future major arterial roadway ?
- What is the adjacency to a tourist or travel focal point/travel node ?
- What is the traffic classification of adjacent roadways feeding the site ?
- What are the volumes of traffic at peak and non-peak periods from the site and what other traffic generators impact local and regional street systems ?
- Are new roadworks and streets required to service the site ?
- How will the site development relate to adjacent street systems ?
- What is the topography of the site and is it conducive to golf course development ?
- Are there any unique physical features on the site that may mitigate or enhance the opportunities for golf course development ?
- Is the proposal on land not used for agriculture and outside of the Agricultural Land Reserve ?
- Is the proposal on low grade agricultural land ?
- Is the proposal on the peripheral edges of agricultural land ?
- Does the proposal act as a buffer between agricultural land and other land uses such as housing and wilderness ?
- Does the proposal act as as a buffer between developable land and un-developable land ?
- Does the proposal act as a buffer between urban development and agricultural land ?
- What is the site capability for agriculture ?
- What are the adjacent agricultural and future agricultural use options ?
- What is the impact on agricultural vehicles access and transportation requirements ?
- What is the site capability for non-agricultural uses ?
- How is the site to be drained and what are the implications ?
- What is the impact on drainage systems ?
- What is the source of the water supply for irrigation and domestic water ?
- What is the method of waste management, treatment and disposal ?
- What is the impact on sanitary sewers and systems ?
- What is the impact on other utility and engineering systems ?

- What is the potential to isolated legal parcels and agricultural production units ?
- What is the land capability and suitability for wildlife in general ?
- What is the impact on habitat for fish and wildlife ?
- Does the proposal impact flight paths and habitat of migratory birds ?
- Does the proposal impact floodplain conditions ?
- Could the proposal have specific environmental or other impacts, such as impacting wetlands, heritage or historic land uses, mature trees and other vegetation ?
- Could the site location be subject to climatic or seasonal limitations ?
- What are the subsoil conditions ?

19.7 Negative Locational Criteria

The previous section has tried to raise questions rather than develop specific criteria. It suggests a systematic approach to evaluating locational criteria. The following is a list of criteria to emphasis the negative aspects of golf course locations on agriculture. These criteria should generally cause the denial of golf course applications. Golf courses should :

- Not be in the centre of agricultural land areas, regardless of land quality
- Not be in site situations where agricultural land becomes isolated by development of the golf course
- Not be in site situations where access to golf course facilities interfere with established agricultural traffic patterns
- Not be in site situations where access to associated facilities to golf courses interfere with established agricultural traffic patterns
- Not be in site situations where the exterior lighting and golfing and other recreational activities interfere with established farming practices, particularly with regard to livestock

19.8 The Business Plan

There is no way of knowing how many of the applications have been preceded by market analysis and the writing of a business plan. The recent successful larger courses are clearly the product of considerable research and an understanding of the marketplace. The Project Team recommends all developers prepare such a plan; the Study provides a checklist of subjects....although there is no guarantee of acquiring approvals and no guarantee of finding appropriate financing. A completed business plan would not only be assessed by the financiers but could be reviewed by a municipality during the planning process. The business plan format offers a systematic way of addressing a plethora of planning issues and regulatory authorities and requirements. The plan, in whole or in part, could form the basis of a development agreement with a municipality. The information provided could equally form the basis for lease agreements between municipalities and lessors of public golf courses. The use of the business plan could reduce concerns over the legitimacy of the proposal and possible golf course failure. It would also provide municipalities with an understanding of the limitations under which an application is made and place into perspective any municipal demands of the applicants for capital expenditures, outside of usual development costs. The business plan should include the following :

- Address of the Golf Course
- Location of Golf Course
- Legal description of the property
- Size of the property
- Site description (topography, present surface drainage, and salient features)
- Soil classification
- Present zoning and land use classification
- Note adjacent land uses and classification
- Present ownership of the land
- Description of ownership of shares (if any)
- Type of Golf Course proposed
- Identification and qualifications of the developer
- Capability of the developer to carry out the work and manage the facility
- Availability of financial resources and source of funds
- Market research and identification of the potential users of the facility
- If a private course, the identification of any use of it by the general public
- Contribution to the local economy
- Off-site proposals and estimates (e.g. roadworks, sewers, water)
- Facility planning program to be related to the overall market research and business plan and to show :
    - General description of use and design parameters for all buildings
    - Parking assessment and requirements
    - Course requirements
    - Associated recreation activities requirements
    - Associated safety requirements
    - Influence of adjacent land uses on layout and design
    - Influence of climate and sun conditions on layout and design
    - Hard and soft landscape assessment and requirements
    - Club house and associated space requirements and spatial relationships
    - Phasing of development (if any)
    - Maintenance facilities description
    - Caretaker's facilities (if required) description
    - Space for exterior storage and screening
    - Check list of codes and other statutory requirements
    - Annotation and assessment probable environmental impacts
- Capital budget and other associated cost allowances (inflation, interim financing, soft and hard costs, etc.)
- Construction program/schedule and anticipated construction method
- Identification and qualifications of the planning and design and other professionals
- Any security deposit, bond and fee
- General site layout and design of the proposal to include conceptual floor plans, elevations and sections and one perspective of all architectural features.

- Details, perhaps as a later stage of the business plan, and information on grounds development and the construction of the facility :
  - Site preparation
  - Utilities and connection to municipal services
  - Earthwork including grading and shaping of playing areas and related facilities
  - Disposal of site material
  - Source of fill, if any
  - Parking areas, roadways and pathways, curbs and gutters
  - Greens construction and seed bed preparation
  - Irrigation
  - Proposed source of water for irrigation
  - "Off-site" construction"
  - Proposed site access for construction vehicles
- Management of the facility :
  - Hours of operation
  - Staffing, job descriptions and qualifications expected
  - Maintenance of the facilities
  - Equipment used for maintenance
  - Exterior signage program
  - Marketing Program
  - Pricing structure (initiation fees, memberships costs, green fees, rental of equipment, etc)
  - Financial projections and monitoring
  - Forecast of operations over a five, ten, fifteen year period
  - Greens management
  - Environmental monitoring

NOTE : THE RECOMMENDATIONS OF THIS STUDY ARE INFLUENCED BY CONCLUSIONS FROM MORE THAN ONE CHAPTER. FOR DETAILS OF THE RECOMMENDATIONS SEE CHAPTER 21.0

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

20.0 GOLF COURSE DESIGN AND SITE DEVELOPMENT

20.0 GOLF COURSE DESIGN AND SITE DEVELOPMENT

20.1 Introduction

The Study has described the differences that exist in zoning bylaws. The intent of this chapter is to illustrate how planning and design standards can be developed, based on an assessment of the function and purpose of specific elements. As will be seen, this raises the question of what common standards or schedules can be applied across the region and what discretionary powers can be used by planning authorities. The Project Team has assembled design information on golf course development that could be translated into clauses in a zoning bylaw. The caveat is that the standards relate to existing perceptions of golf course development. Where "regular" golf course development is anticipated the zoning regulations can be clear and precise. However, golf course development can also be controlled by some form of development agreement using prevailing or emerging standards rather than through the use of a standard zoning bylaw. The facility and site variables and the potential impacts are so great that the land use control requires a fairly rigorous and sophisticated methodology.

20.2 Design and Development Guidelines

These following guidelines relate to the full size course and are to illustrate the assessment that is required as golf course design criteria changes to meet emerging demands. The future of golf may be in development forms that take more modest areas of land serving a specialized market. These kinds of facilities, such as the shorter course and family golf centres, develop different design criteria than the full-size course. As noted in Chapter 19, these varying requirements can be described in a facility program, be part of the business plan and incorporated into development agreements.

20.3 Recommended Land Areas

Recommendations on golf course size are subject to variables beyond the scope of this report. Course sizes vary throughout the region. Many tournament courses in the Study Area have sites ranging from 110 acres to 200 acres. The average size of these full-size courses is close to 125 acres, which is one recommended size from PGA literature. (See Appendix Exhibit "B") More recently, the concern over safety of a growing number of less skilled players has lead golf course architects to recommend 160 acres for a full-size course. Indeed, this is the recommended size of the course proposed for North Vancouver, where the terrain and the landscape is a factor that can be used to the advantage of player safety. The following recommendations are based on what might be called "a worst case scenario" in which the site is virtually flat land with no trees above 10'0" to offer reasonable protection or safety to the users. The hypothetical site is open to prevailing winds. No allowance has been made for easements or hydro corridors. The site boundaries are presumed to be regular in shape and there are no unique topographic features to reduce the potential for course development. It is assumed the site is easy to access and parking requirements are as recommended later in this chapter. It is also assumed that there are no other associated facilities, e.g.

recreational facilities, housing, hotel, convention centre included in the space calculation.

The method of calculation is based on a playing area for 18 holes in two separate rectangles, each accommodating 9 holes and each having an area of 5,880' x 670'. This area is approximately 181 acres and allows for player safety between tees, fairways and greens, without the protection of plant material or natural features. It allows for set-backs from property lines. Added to this is a modest allowance (4 acres) for club house, parking, maintenance facilities and storage. The resultant extrapolated areas for various courses are as follows :-

- Tournament Course (7,000 yards+)
  200 useable acres with an ideal average gradient in playing areas of 8%
  Recommended maximum gradient on shortest fairway (150 yards) : 15%
  Total playing and development area : 185 acres
  Additional area allowance for tournament spectators and parking
- 6,500 yards+ Course (sometimes known as a championship course)
  185 useable acres with an average gradient in playing areas of 8%
  Suggested maximum gradient on shortest fairway : 15%
- Par 3 Course
  45 to 55 useable acres with average hole length of 120 yards
- Pitch and Putt Courses
  35 useable acres with average hole length 100 yards.
- Driving Range
  7.5 to 9.0 acres useable acres

20.4 A Comment on Competition Courses

This Study has already provided definitions of golf course types for the purpose of assessing supply and demand. In other planning studies, for example in the work of Delta, Surrey and Langley planning departments, there are other definitions of golf course types. The definition is particularly confusing for courses exceeding 6,000 yards. These 18 hole courses have been quite often classified by different golfing bodies as "championship courses". Historically, this has meant to infer that the course has previously held a tournament of championship stature. By implication this implies the course will provide a notable test of golfing ability. Over time and when proposed courses are being described, the terminology has been more often used to describe the length of a course rather than the demands of the course. It is certainly not about the past playing of tournaments. Because of this, it is recommended that proposed 18 hole courses be classified by potential yardage and par designation.

20.5 Parking Requirements

Five measurements determine the parking space requirement related to just the golf course activity : the number of players waiting to go and off the course; the number of players per tee; the time between play at each tee (tee spacing); the time taken to play a round of golf; the time spent leaving the site. It should be assumed that the maximum number of players per tee is four (a foursome). Parking requirements do vary by location and course type and this is noted later. The calculation of parking spaces should assume each player comes in a vehicle.

- Example :-

  A foursome, starting at eight minute intervals and playing a typical round of 18 holes, takes four and a half hours to complete the course.

  4.5 hours x 60 minutes divided by 8 minutes x 4 players = 135 players (33.75 foursomes)

Using this formula, there would be 135 players on the course, four about to tee off and four walking off the course. If after the playing golf, the retention time is fifteen minutes, there will be another 15 people still on the property.

20.6 The Public Course

Public pay-for-play courses like to get their foursomes off in 6.5 to 7.0 minutes. Five to six hour rounds are fairly common on public courses. Public courses tend to accommodate a fair number of non-players.

- Examples :-

  5 hours x 60 minutes divided by 6.5 minutes send offs x 4 player = 184 players
  6 hours x 60 minutes divided by 6.5 minute send offs x 4 players = 221 players
  5 hours x 60 minutes divided by 7 minute send offs x 4 players = 171 players
  6 hours x 60 minutes divided by 7 minute send offs x 4 players = 205 players
  Add 15 to each sum for off-course players

20.7 The Private Course

The norm on private courses tends to be from 4.5 hours to 5.0 hours. Private and Semi-private courses tend to have less non-players.

- Examples :-

  4.5 hours x 60 minutes divided by 8 minute send offs x 4 players = 135 players
  4.5 hours x 60 minutes divided by 10 minute send offs x 4 players = 108 players
  5 hours x 60 minutes divided by 8 minute send offs x 4 players = 150 players
  5 hours x 60 minutes divided by 10 minute send offs x 4 players = 120 players
  Add 15 to each sum for off-course players

20.8 A Comment on the Examples and Parking Requirements

The above numbers of golfers are based on maximum demand, keeping in mind that if the course is accommodating five hour rounds, it takes five hours to load the course and five hours to empty it. The course is going to be a very busy facility. Nonetheless, the parking requirement should meet peak demand. The numbers of parking spaces for Vancouver Parks Board public courses all appear to have present demands close to the above figures. It is thought that public courses may have 1.75 golfers per car. A private course may have 1.25 golfers per car. The Ministry of Highways requirement of 150 cars seems to be a defensible minimum for any kind of 18 hole course. Clearly, the provision of parking for 200 golf course users is not unreasonable for a public course. The use of a calculation of 2 or 4 spaces per tee, as in some zoning bylaws, may not meet the demand of a successful course at peak periods. Parking area usually takes about 1.8 to 2.0 acres to accommodate the golfing activity

20.9 Other Parking

On site parking allowance should also allow for :-

- Visitors/non-playing members/guests
- Associated land uses at prevailing zoning standards (e.g. restaurant)
- Spectators (championship/tournament courses)
- Staff
- Maintenance and service vehicles

It is not possible in this report to cover these noted additional requirements. Most zoning (golf course) bylaws reviewed included additional calculations for parking based on standards for other kinds of land use such as restaurants or commercial zoning. If a business plan becomes part of an application, then the parking amount could be more carefully calculated.

20.10 Site Location of Parking, Other Features and Adjacent Roadways

Once design layout of the site has been completed, the location and adequacy of driveways on site should be reviewed with regard to street access. Internal roadway and parking layout and "storage magazine" area should be designed to ensure parking areas and areas for vehicle movements are within accepted standards for public safety. Where possible all parking and vehicle movement should be on the site. Off-street parking spaces should be numbered and marked and be of appropriate size, accessed from aisles to municipal standards. Where this is not possible, it is recommended that on-street parking be identified for use of golf course patrons.

20.11 Layout Variables

The safety of travellers and pedestrians on adjacent highways streets can be met through design. Tees and greens can be located to avoid balls on highways and roadway. The alternative is to widen or relocate the roadway at developer's expense.

Golf course site development should allow for any future highway and upgrading to adjacent highways and roadways.

20.12 Quality and Location of Parking Space

The standards for the quality of parking surface can be varied to suit the nature of the golfing experience provided. There may be some courses where the parking could be a mix of prepared surface (blacktop) and gravel for peak demand. A paved surface is recommended, with catchbasins and oil traps to all parking areas. This is mandatory when close to a creek or river. There are municipal and provincial set-back requirements for surface parking adjacent to creeks and rivers.

20.13 Shapes, Setbacks and Other Dimensions (Championship standards)

Assemblies of land obviously vary in shape. The minimum width to allow for a fairway and safety area is 670'.0". The minimum length for a fairway and safety area is 1,500'.0" These measurements assume a clear area with no interruptions by trees or natural features. Set-backs from a golf course property line to the centre line of the fairway should never be less than an average of 210'0". Average centreline widths between fairways should be never less than 270'0". The average on the centreline from greens to tees should be never less than 150'0".

20.14 Safety Areas, Pedestrian Pathways, Housing Setbacks

The safety of non-playing users of a golf course is of paramount importance to developers and municipalities who may look to the golf course to provide other recreational activities. There should be a minimum width of 210 feet between the centreline of greens and tees with the pedestrian pathway meandering centrally. Essentially, this is a 60'0" corridor width for the pathway and includes buffer elements. Setbacks for housing should be no less than 250'0" from fairway centre line to foundation edge, where the site tends to be open.

20.15 Buffer Zones and Golf Course Buildings

Buffer landscape screening should be not less than 220'0" from the centreline of the fairway. Buffer landscape areas should not be less than 150'0" perpendicular to the fairway. Golf course building should be not less than 220'0" from the centreline of a fairway.

20.16 The Club House

Club houses come in all shapes and sizes. There is no consensus on what the size should be. There is no clear indication that the size can be based on the size and type of the course. Two floors above grade tends to be the maximum height and many bylaws allow two floors above grade. The Club House size and form is as much the product of the business plan as it is to meet the basic accommodation requirements of the golfers, and the basic requirements are open to discussion. Evaluation of a proposed clubhouse or an addition to an existing facility would be much easier to review if facility planning criteria were developed from the requirements of a business plan. In the Delta zoning bylaw, restrictions on size and height are seen essential to ensure compatibility with the scale of development elsewhere in the community.

20.17 Maintenance Facilities

Maintenance facilities seem to require about the same number of square feet as there are yards to the course. A 7,000 yard course requires about 7,000 gross square feet for maintenance facilities. Once again, there is a case for writing the business plan and the facility program to define real requirements.

20.18 Caretakers Residence

The Project Team suggest that standards that already prevail in other zoning bylaws should be reviewed for application to this golf course use. Once again, there is a case for writing the business plan and the facility program to define real requirements.

20.19 Associated Facilities

These may include outdoor storage and golf cart storage space: the space requirements tend to be quite modest. It is suggested that these components be incorporated into the design of the club house or maintenance facilities and be screened by walls or landscaping.

20.20 Landscaping Requirements

Landscaping requirements need to be addressed for each individual application. The Project Team suggests that landscape design requirements should include the following, which may be in addition to those that might be currently established in zoning bylaws :-

- Development of a comprehensive plant list for all primary areas and elements of the course
- Adherence to requirements for landscaped buffers in areas bordering 'safety zones', such as the clubhouse, parking lots, and entrances, and for the interface between course perimeter uses and non-golf activities. These requirements would ensure that buffers be clearly identified as to height, density, and type of plant material.
- Provision of a preservation and management plan for existing trees and forest groves covering all phases of course construction, utilization, and ongoing maintenance

20.21 Professional Service Requirements

Some municipalities insist on the landscape design work being done by a landscape architect, registered in British Columbia. It should be noted that there are also requirements under the Architects and the Engineers Acts which require the use of registered architects and professional engineers in specific circumstances.

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21.0 RECOMMENDATIONS

21.0 CONCLUSIONS AND RECOMMENDATIONS

21.1 Meeting the Demand and the Supply

Golfing is clearly a justified recreational form and suited to the nature of the Study Area. It meets both local and non-local demand and can be given a definite place in the development of the region. The supply is provided by both the public and private sectors. The Project Team recommends :-

- **That the targets described in this Study for the "optimum" number of golf courses by Sub-region should be met through development by both the public and private sectors, so that by 1996 there will be an additional 19 courses (excluding those now under construction or approved) to meet local demand and an additional 5 golf courses constructed to meet the tourism demand. The supply and demand situation should be reviewed by the GVRD again in 1996.**

REFERENCE : CHAPTER 18.0/18.2/18.3

21.2 Supply by the Public Sector

There is a continued and important role for the public sector. The supply and the cost of golfing requires moderation of fees, if the recreation is to be reasonably accessible and affordable in the high demand urban areas where land costs are also high. There is also a need to overcome the concerns about the change of land use that could follow golf course failure. All this can be done if the municipality is the developer and landlord and there are good examples to follow in the Study Area. The Project Team recommends :-

- **That provincial, regional and municipal park and other public lands should be investigated by each government for golf course development potential: municipalities should include golf as a component of their recreational programs and be the developers and managers, where necessary, of properly located public golf courses.**

REFERENCE : CHAPTER 2.0/2.7/2.8
CHAPTER 9.0/9.5/9.7/9.8/9.9/9.11/9.13
CHAPTER 19.0/19.6/19.7

The implication of this recommendation is that regional government and municipalities must consider the supply and demand outside of their land areas to include the Study Area of this report. There is an opportunity to build on the experience of Study Area public golf course models, and include other publicly provided recreational activities with the golf course developments.

21.3 Supply by the Private Sector

The private sector has provided and is providing affordable golf, particularly in the lower land cost Sub-regions of the Study Area. Nonetheless, the community has serious doubts about the motives behind recent golf course development proposals. If the industry is seen to be negating the role of providing unique, yet affordable golfing experiences to the Lower Mainland public by, for example, selling to off-shore buyers or seeing the land use as short term and transitional, it will find even less support for the development of the privately owned course. There is, therefore, a risk that the demand from golfers in the Study Area and the demand from golfing visitors will be met elsewhere in British Columbia and in the USA., with a consequent loss of recreational and economic opportunity for the Lower Mainland. The industry will have to bring a higher level of planning and design skills to the developmental process and in doing so accept the real costs of professional services. There are applications prepared by local professionals that are first-class in content and presentation. The Project Team recommends :-

- **That the private sector must be prepared to spend more time and money preparing a business plan to clearly identify the market segment to be served and to show what impact the course will have on local demand and tourism demand for golf, and to prepare site surveys and environmental impact assessment studies as may be required.**
  REFERENCE : CHAPTER 19.0/19.8

21.4 Locational Criteria

The Study provides criteria for the location of golf courses, with due regard to accessibility and impacts on agricultural land, the agricultural community and the environment. To have any benefit the locational criteria must be implemented consistently across the Study Area. The Project Team recommends :-

- **That the B. C. Government and municipalities in the Study Area should incorporate the list of locational criteria, if not already incorporated, in planning regulations.**
  REFERENCE : CHAPTER 19.0/19.6/19.7

21.5 Regional and Agricultural Land Use and Location of Golf Courses

Municipalities bear the burden of decision making regarding golf course use on agricultural land. Municipal land use decisions are specific to applications within the municipal boundary, yet the demand for golf and the location of high quality agricultural land crosses municipal and regional boundaries.

The subject of agricultural land use in the Study Area requires a longer term outlook, beyond a municipal boundary and beyond the electorate at the municipal level. The Agricultural Land Commission has fulfilled the longer term outlook function. The weakness is that the ALC is responsible for only a single land use. The Project Team recommends :-

- **That B. C. Reg. 238/88, Section 2 (1)(M), which permits golf course development within the Agricultural Land Reserve and removes the Agricultural Land Commission's power to prohibit such developments, should be rescinded by the Government of British Columbia.**
  REFERENCE : CHAPTER 13.0/13.11/13.12/13.16/13.17/13.26

21.6 Protection of Agricultural Land

The higher classifications of land in the Agricultural Land Reserve should have protection from any and all development, including golf course development. The Project Team recommends :-

- **That no portion of a golf course proposal should contain soils with Land Capability for Agriculture Class 1, 2, or 3, under improved conditions (drained**

and irrigated) with exceptions being for isolated pockets of agricultural land within non-Agricultural Land Reserve land, confined by urban uses.
REFERENCE : CHAPTER 13.0/13.11/13.12/13.16/13.7/13.26

21.7 The Place for Golf Course Development

Agricultural land of lower capability has been approved by the Agricultural Land Commission and municipalities for golf course development. Frequently the land is marginal and better developed for non-agricultural purposes. There is also land available that will never be suited to agricultural use. The Project Team recommends :-

- **That non-agricultural land should be the preferred location for golf courses and if such land is unavailable or the locational criteria cannot be met then land of Agricultural Classes 4, 5 ,6 and 7 in the Agricultural Land Reserve should be the alternative place for golf course development.**
  REFERENCE : CHAPTER 13.0/13.9

21.8 A Lower Mainland Golf Development Plan

Golf course development requires thorough and extensive planning processes by both municipality and developer. It also requires systematic assessment and approval processes so that the negative impacts can be minimized and the recreational and economic benefits optimised for the Lower Mainland community.

Developers need direction as to what facilities will be approved and where, and information on what regulatory bodies have to be part of the process. The industry, which has had little developmental success in the recent past, would welcome a planning framework. The Project Team recommends :-

- **That the Greater Vancouver Regional District should prepare a Lower Mainland Golf Development Plan. While encouraging development it should also have due regard for implementing and monitoring processes, with a sensitivity for the complexity of the subject, the vast body of public and private interest in golf course development, and the planning frameworks that already exist at the regional and municipal levels.**
  REFERENCE : CHAPTER 16.0/16.9
  CHAPTER 9.0/9.2
  CHAPTER 19.0

21.9 Zoning Bylaws and Development Agreements

There are differences, usually with justification, in the schedules of zoning requirements from municipality to municipality, but the parking requirements and safety factors are common to all courses regardless of location. There are also minimal requirements, which should be upgraded, for land development in unorganized territory. The Project Team recommends :-

- **That the B. C. Government and municipalities should review their land use legislation with a view to bringing greater commonality in golf course zoning schedules with particular reference to the requirements for parking and on-and-off-course public safety.**
  REFERENCE : CHAPTER 2.0/2.7/2.8

CHAPTER 12.0/12.8

21.10 New Approaches to Golf

The golfing industry has, in the Study Area, taken a conservative approach to the development of golf course facilities. Recently constructed courses and applications are generally based on prevailing and accepted traditional golf course layout and design standards, not recognising the inevitable trends responding to limited land availability, accessibility and location. The Project Team recommends :-

- **That municipalities should encourage developers, through changes to land use regulations, to seek innovative ways of providing affordable public golf experiences requiring less land in areas closer to urban centres and in zones not presently allowing golf course uses such as retail, commercial, and industrial zones.**

REFERENCE : CHAPTER 2.0/2.7/2.8
CHAPTER 12.0/12.8

21.11 Community Concerns : Site Location and the Environment

The concerns of the community focus on the location of golf courses and the consequences of development on the community and the environment. While there are federal and provincial regulatory agencies and legal mechanisms that can be used by municipalities to meet or mitigate these concerns, golf course development is still fraught with differences of perception between community and developer. Some of this is brought about by the absence of,or the minimal approach to "front-end" research and surveys of the site by the developer. At least one development proposal has been denied because the developer did not understand the details of environmental issues until it was too late. Somehow, the concerns for potential impacts need to be aired right at the outset. It is noted that some municipalities do bring information on golf course development out in the open at the beginning; others await the rezoning process. The Project Team recommends :-

- **That the information requirements, including appropriate studies and surveys, (with particular regard to the environmental impacts relating to site location and development) should be clearly established between the municipality, and the developer. At the beginning of the application there should be due regard for the informational requirements of the B. C. Government, Ministry of the Environment and the Ministry of Highways and Transportation, the B. C. Agricultural Land Commission, the Canadian Wildlife Service, Fisheries and Oceans Canada, the regional district, and any other government and community groups, as may be determined by the nature of the proposal. At the very least, an information meeting to examine the likely impacts and establish a timetable, should be held by a municipality with the developer at the start of the process.**

REFERENCE : CHAPTER 14.0/14.18
CHAPTER 15.0/15.6
CHAPTER 16.0/16.9
CHAPTER 17.0/17.3

21.12 Community Concerns : Failures and Finances

The notion that a golf course is designed to fail, so that a higher and better value land use can be justified, is a real concern to regulating agencies and the community. On the other hand, municipalities, not aware of the financial implications on a golf course economic proforma, have applied conditions for approving development. While the conditions may have seemed to be entirely justified and there has been agreement between developer and municipality, the financial impact may have guaranteed golf course failure, unknown to the municipality. The Project Team recommends :-

- **That prior to rezoning, municipalities must be assured of the financial viability of the golf course application and seek appropriate information relating to the financing and operation of the proposed or modified golf course over a horizon of five, ten or more years.**

REFERENCE : CHAPTER 10.0/10.20

This is particularly necessary if the applicant is obliged to cover such capital costs as extended utilities and roadways, and environmental monitoring.

21.13 The Golf Industry, Environmental Concerns and Management

To meet the challenge caused by the demand, the golfing industry will have to provide higher quality facilities at affordable prices; higher levels of management and technical skills will be required. Course superintendents are beginning to use high technology to regulate irrigation and other systems and in doing so, they have greater control over possible environmental impacts. Community colleges already offer relevant courses. The Project Team recommends :-

- **That the golfing industry should review with the B. C. Government, Ministry of Advanced Education and Job Training and Ministry of the Solicitor General, the establishment of a body for the specific licensing, education and certification of golf course managers, operators and groundskeepers.**

REFERENCE : CHAPTER 11.0/11.4

21.14 The Province

This Study is for a specific area in British Columbia. It reports that golfers cross regional district and municipal boundaries. They also seek golfing experiences elsewhere in British Columbia, other provinces and the United States of America. The expansion opportunity for tourism and the attraction of major tournaments to the Study Area exists in a provincial context. The Province has already investigated opportunities related to tourist development. This Study cannot report on or relate to an overall provincial picture. The Project Team recommends :-

- **That the B. C. Government, Ministry of Development, Trade and Tourism, and the Ministry of Municipal Affairs, Recreation and Culture, and the Agricultural Land Commission and others, should collaborate in the preparation of a policy framework for provincial/regional golf course development.**

REFERENCE : CHAPTER 8.0
CHAPTER 11.0/11.8

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22.0 APPENDICES

NOTES TO APPENDIX EXHIBITS "A" and "B"

As the work has unfolded, the decisions on golf course development have been subject to change. To complicate things, the introduction of the Goods and Services Tax has impacted golf course data gathering. Inevitably, this changing situation has create some difficulties for the Project Team in keeping abreast of base information. This will be seen by the reader in the establishment of a cut-off date for reporting applications, as report in Appendix Exhibit "A" and in some inaccuracies in the data on golf courses in Exhibit "B".

INCLUSION OF FACILITIES IN THE INVENTORY : EXHIBIT "A"

The discovery and examination of the current inventory of golf courses in the Lower Mainland was undertaken as part of this study, together with an inventory of the additional courses for which application has been made to either the Agricultural Land Commission or to the local municipalities in a formal sense. This latter phrase is of particular importance; there are many possible golf courses which are under consideration by someone, either the owner of the land or a developer. Some of these proposals have come to the attention of the Study Team, but are not included in the inventory. For the purpose of the Study, the golf facilities and applications that have been described are as follows :-

EXISTING, meaning an existing golf course of various kinds or driving range.

PENDING, meaning a formal application has been made to the Agricultural Land Commission (ALC), if required, and a municipality, and at December 31st. 1990, not all municipal approval stages had been completed.

APPROVED, meaning a formal application has been made to the ALC, if required, and a municipality, and at December 31st. 1990, the application had received final reading and full approval of a municipality.

DENIED, meaning that at December 31st. 1990, a formal application to the ALC, if required, and a municipality had been made, but approval had been denied by a municipality.

INACTIVE, meaning a formal application has been made to the ALC, if required, and a municipality, and at December 31st. 1990 there had been no further action by the applicant.

PROPOSED, meaning that a proposal has been receieved and has not be approved or denied.

PLEASE NOTE : EXHIBIT "B" DOES NOT REPORT ALL FACILITIES IN THE STUDY AREA. AT THE TIME OF THE SURVEY SOME FACILITIES WERE NOT OPEN AND DATA WAS THEREFORE NOT COLLECTED.

EXHIBIT A-BASE LIST

REF NO.	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS APPLICATION		REGIONAL DISTRICT	STUDY SUB AREA
REF NO.	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS APPLICATION		REGIONAL DISTRICT	STUDY SUB AREA
85	RIVERWAY	BURNABY	18	FULL SIZE	ALC	APPROVED**	GVRD	1
41	BURNABY MT	BURNABY		DRIVING RANGE		EXISTING	GVRD	
36	BURNABY MT	BURNABY	18	FULL SIZE		EXISTING	GVRD	1
122	CENTRAL PITCH AND PUTT	BURNABY	18	PITCH/PUTT		EXISTING	GVRD	1
144	KENSINGTON PITCH AND PUTT	BURNABY	18	PITCH/PUTT		EXISTING	GVRD	1
6	VANCOUVER	COQUITLAM	18	FULL SIZE		EXISTING	GVRD	1
54	CARNOUSTIE	PORT COQUITLAM		DRIVING RANGE		EXISTING	GVRD	1
1	CARNOUSTIE	PORT COQUITLAM	18	FULL SIZE		EXISTING	GVRD	1
147	MYLORA-WEST	RICHMOND		DRIVING RANGE		EXISTING	GVRD	1
153	MIKASA	RICHMOND		DRIVING RANGE		EXISTING	GVRD	1
60	MAYFAIR LAKES	RICHMOND		DRIVING RANGE		EXISTING	GVRD	1
68	PACIFIC COAST	RICHMOND		DRIVING RANGE		EXISTING	GVRD	1
148	MYLORA-WEST	RICHMOND	9	EXECUTIVE		EXISTING	GVRD	1
40	MYLORA	RICHMOND	18	EXECUTIVE		EXISTING	GVRD	1
2	QUILCHENA	RICHMOND	18	FULL SIZE		EXISTING	GVRD	1
8	RICHMOND	RICHMOND	18	FULL SIZE		EXISTING	GVRD	1
38	GREENACRES	RICHMOND	18	FULL SIZE		EXISTING	GVRD	1
39	MAYFAIR LAKES	RICHMOND	18	FULL SIZE		EXISTING	GVRD	1
149	WEST RICHMOND P AND P	RICHMOND	9	PITCH/PUTT		EXISTING	GVRD	1
106	TALVAS/GILMORE	RICHMOND	21	FULL SIZE	ALC	PENDING	GVRD	1
107	HOGLER	RICHMOND	9	PITCH/PUTT	ALC	PENDING	GVRD	1
56	UNIVERSITY	UEL		DRIVING RANGE		EXISTING	GVRD	1
17	UNIVERSITY	UEL	18	FULL SIZE		EXISTING	GVRD	1
62	FRASERVIEW	VANCOUVER		DRIVING RANGE		EXISTING	GVRD	1
63	MUSQUEAM	VANCOUVER		DRIVING RANGE		EXISTING	GVRD	1
134	LANGARA	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
3	MARINE DRIVE	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
4	SHAUGHNESSY	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
5	POINT GREY	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
45	MCCLEERY	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
52	FRASERVIEW	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
53	MUSQUEAM	VANCOUVER	18	FULL SIZE		EXISTING	GVRD	1
135	RUPERT	VANCOUVER	9	PITCH/PUTT		EXISTING	GVRD	1
136	STANLEY PARK	VANCOUVER	9	PITCH/PUTT		EXISTING	GVRD	1
137	QUEEN ELIZABETH PARK	VANCOUVER	9	PITCH/PUTT		EXISTING	GVRD	1

EXHIBIT A-BASE LIST

REF	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS		REGIONAL DISTRICT	STUDY
NO.					APPLICATION			SUB AREA
16	SQUAMISH VALLEY	BRACKENDALE	18	FULL SIZE		EXISTING	SQUAMISH-LILLOOET	2
59	LIONS GATE	NORTH VANCOUVER		DRIVING RANGE		EXISTING	GVRD	2
9	SEYMOUR	NORTH VANCOUVER	18	FULL SIZE		EXISTING	GVRD	2
130	MURDO FRAZER	NORTH VANCOUVER	9	PITCH/PUTT		EXISTING	GVRD	2
24	NORTHLANDS	NORTH VANCOUVER	18	FULL SIZE		APPROVED*	GVRD	2
140	PEMBERTON VALLEY	PEMBERTON	9	FULL SIZE		EXISTING	SQUAMISH-LILLOOET	2
115	WUSCHKE	PEMBERTON	18	FULL SIZE	ALC	PENDING	SQUAMISH-LILLOOET	2
43	GLENEAGLES	WEST VANCOUVER	9	EXECUTIVE		EXISTING	GVRD	2
7	CAPILANO	WEST VANCOUVER	18	FULL SIZE		EXISTING	GVRD	2
138	AMBLESIDE P AND P	WEST VANCOUVER	18	PITCH/PUTT		EXISTING	GVRD	2
42	WHISTLER	WHISTLER	18	FULL SIZE		EXISTING	SQUAMISH-LILLOOET	
141	CHATEAU WHISTLER	WHISTLER	18	FULL SIZE		APPROVED	SQUAMISH-LILLOOET	2
150	GREEN LAKE	WHISTLER	18	FULL SIZE		PENDING	SQUAMISH-LILLOOET	2
	**UNDER CONSTRUCTION *APPROVED TO DESIGN CONCEPT							

EXHIBIT A-BASE LIST

REF	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS		REGIONAL DISTRICT	STUDY
NO.					APPLICATION			SUB AREA
116	GILMORE	BARNSTON IS	18	FULL SIZE	ALC	PENDING	GVRD	3
117	DERWIT	BARNSTON IS	18	FULL SIZE	ALC	PENDING	GVRD	3
86	BOUNDARY SHORES	DELTA	18	FULL SIZE	ALC	DENIED**	GVRD	3
129	CAPTAINS COVE	DELTA	9	EXECUTIVE		APPROVED	GVRD	3
55	TSAWWASSEN	DELTA		DRIVING RANGE		EXISTING	GVRD	3
64	SUNSHINE HILLS	DELTA		DRIVING RANGE		EXISTING	GVRD	3
15	TSAWWASSEN	DELTA	18	EXECUTIVE		EXISTING	GVRD	3
35	BEACH GROVE	DELTA	18	FULL SIZE		EXISTING	GVRD	3
37	DELTA	DELTA	18	FULL SIZE		EXISTING	GVRD	3
145	SUNSHINE HILLS	DELTA	18	PITCH/PUTT		EXISTING	GVRD	3
118	WALKER/DELTA GOLF COURSE	DELTA		DRIVING RANGE	ALC	PENDING	GVRD	3
88	DAVIES	DELTA	18	EXECUTIVE	ALC	PENDING	GVRD	3
89	TSAWWASSEN	DELTA	9	EXECUTIVE	ALC	PENDING	GVRD	3
87	BAYVIEW/HOLLINGSWORTH	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
90	PACIFIC LAGOONS	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
91	DELTA PINES	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
92	DELTA DOWNS	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
93	CRESCENT ISLAND	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
94	DORNOCH DUNES	DELTA	39	FULL SIZE	ALC	PENDING	GVRD	3
95	DEL EDEN	DELTA	18	FULL SIZE	ALC	PENDING	GVRD	3
33	POPPY ESTATE	LANGLEY	18	EXECUTIVE		EXISTING	GVRD	3
50	TALL TIMBERS	LANGLEY	18	EXECUTIVE		EXISTING	GVRD	3
12	FORT LANGLEY	LANGLEY	18	FULL SIZE		EXISTING	GVRD	3
13	NEWLANDS	LANGLEY	18	FULL SIZE		EXISTING	GVRD	3
57	LANGLEY GOLF CENTRE	LANGLEY		DRIVING RANGE		EXISTING	GVRD	3
146	LANGLEY GOLF CENTRE	LANGLEY	18	PITCH/PUTT		EXISTING	GVRD	3
98	DORF/JENSONS MUSHROOM FM	LANGLEY	9	EXECUTIVE	ALC	DENIED**	GVRD	3
99	BAKERVIEW/CRIMSON POULTRY	LANGLEY	9	EXECUTIVE	ALC	APPROVED**	GVRD	3
105	REDWOOD	LANGLEY	18	EXECUTIVE	ALC	PENDING	GVRD	3
96	EMERALD ACRES	LANGLEY	18	FULL SIZE	ALC	PENDING	GVRD	3
97	FRASER PULP CHIPS/BROWN	LANGLEY	18	FULL SIZE	ALC	PENDING	GVRD	3
100	GLEN VALLEY	LANGLEY	18	FULL SIZE	ALC	PENDING	GVRD	3
101	THE BELMONT	LANGLEY	18	FULL SIZE	ALC	APPROVED**	GVRD	3
102	69903 HOLDINGS	LANGLEY	18	FULL SIZE	ALC	PENDING	GVRD	3
103	WALL	LANGLEY	18	FULL SIZE	ALC	DENIED**	GVRD	3
104	SMUGGLERS CREEK	LANGLEY	27	FULL SIZE	ALC	PENDING	GVRD	3
139	GLOUCESTER PROPERTIES	LANGLEY	18	FULL SIZE	NON-ALC	APPROVED		
58	COYOTE CREEK	SURREY		DRIVING RANGE		EXISTING	GVRD	3
61	RIVERSIDE	SURREY		DRIVING RANGE		EXISTING	GVRD	3
66	WHALLEY GOLF	SURREY		DRIVING RANGE		EXISTING	GVRD	3
19	COYOTE CREEK	SURREY	18	EXECUTIVE		EXISTING	GVRD	3
14	HAZELMERE	SURREY	18	FULL SIZE		EXISTING	GVRD	3
22	GUILDFORD	SURREY	18	FULL SIZE		EXISTING	GVRD	3
31	NICO-WYND	SURREY	9	FULL SIZE		EXISTING	GVRD	3

EXHIBIT A-BASE LIST

REF	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS		REGIONAL DISTRICT	STUDY
NO.					APPLICATION			SUB AREA
32	PEACE PORTAL	SURREY	18	FULL SIZE		EXISTING	GVRD	3
34	SURREY GOLF COURSE	SURREY	18	FULL SIZE		EXISTING	GVRD	3
49	RIVERSIDE	SURREY	9	PAR 3		EXISTING	GVRD	3
131	MERIDIAN	SURREY	18	PITCH/PUTT		EXISTING	GVRD	3
46	GREENSIDE	SURREY	18	PITCH/PUTT		EXISTING	GVRD	3
48	SUNRISE	SURREY	9	PITCH/PUTT		EXISTING	GVRD	3
108	KEHLER	SURREY		DRIVING RANGE	ALC	INACTIVE	GVRD	3
109	SUNNYSIDE/HUNGERFORD	SURREY	18	EXECUTIVE	ALC	INACTIVE	GVRD	3
112	WESTCRAFT	SURREY	18	EXECUTIVE	ALC	PENDING	GVRD	3
110	RUNNYMEDE	SURREY	18	FULL SIZE	ALC	PENDING	GVRD	3
111	STEWART	SURREY	36	FULL SIZE	ALC	PENDING	GVRD	3
113	HILLSIDE	SURREY	18	FULL SIZE	ALC	DENIED	GVRD	3
132	WONG AND LEUNG	SURREY	9	PAR 3		PROPOSED	GVRD	3
133	SHATO HOLDINGS	SURREY	9	PAR 3		PROPOSED	GVRD	3
61	ORLAND KURTENBACH	SURREY		DRIVING RANGE		EXISTING	GVRD	3
	*DENIED BY MUNICIPALITY							

EXHIBIT A-BASE LIST

REF NO.	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS APPLICATION		REGIONAL DISTRICT	STUDY SUB AREA
27	MAPLE RIDGE MUNICIPAL	MAPLE RIDGE	9	EXECUTIVE		EXISTING	DEWDNEY-ALOUETTE	4
123	HACKERS HAVEN	MAPLE RIDGE	9	PITCH/PUTT		EXISTING	DEWDNEY-ALOUETTE	4
20	EIGHTEEN PASTURES (IRON MT.)	MISSION	18	FULL SIZE		EXISTING	DEWDNEY-ALOUETTE	4
30	MISSION GOLF & COUNTRY	MISSION	9	FULL SIZE		EXISTING	DEWDNEY-ALOUETTE	4
71	CHESTER CREEK	MISSION	18	FULL SIZE	ALC	PENDING	DEWDNEY-ALOUETTE	4
11	PITT MEADOWS	PITT MEADOWS		DRIVING RANGE	ALC	APPROVED	DEWDNEY-ALOUETTE	4
69	ELLENDALE FARMS	PITT POLDER	27/36	FULL SIZE	ALC	PENDING	DEWDNEY-ALOUETTE	4
67	GOLDEN EAGLE ESTATES	PITT POLDER	18/18	FULL SIZE	ALC	PENDING	DEWDNEY-ALOUETTE	4
21	MEADOW GARDEN(Save on Golf)	PITT MEADOWS		DRIVING RANGE		EXISTING	DEWDNEY-ALOUETTE	4
10	MEADOW GARDENS	PITT MEADOWS	18	FULL SIZE		EXISTING	DEWDNEY-ALOUETTE	4
11	PITT MEADOWS GOLF CLUB	PITT MEADOWS	18	FULL SIZE		EXISTING	DEWDNEY-ALOUETTE	4

EXHIBIT A-BASE LIST

REF NO.	NAME OF COURSE	MUNICIPALITY	HOLES	TYPE	ALC STATUS APPLICATION		REGIONAL DISTRICT	STUDY SUB AREA
26	LEDGEVIEW	ABBOTSFORD	18	FULL SIZE		EXISTING	CENTRAL FRASER VALLEY	5
70	THORNHILL(STRAITON)	ABBOTSFORD	18	FULL SIZE		PENDING	CENTRAL FRASER VALLEY	5
83	BAKERVIEW	ABBOTSFORD	18	FULL SIZE	ALC	PENDING	CENTRAL FRASER VALLEY	5
84	BAKERVIEW	ABBOTSFORD		DRIVING RANGE	ALC	PENDING	CENTRAL FRASER VALLEY	5
120	WAYSIDE	ABBOTSFORD	18	PAR 3		EXISTING	CENTRAL FRASER VALLEY	
121	MAWHINNEY	ABBOTSFORD	9	EXECUTIVE	ALC	PENDING	CENTRAL FRASER VALLEY	5
44	MAWHINNEY	ABBOTSFORD		DRIVING RANGE	ALC	PENDING	CENTRAL FRASER VALLEY	5
76	ROYALWOOD/EHRENHOLZ	CHILLIWACK		DRIVING RANGE	ALC	APPROVED	FRASER CHEAM	5
75	ROYALWOOD/EHRENHOLZ	CHILLIWACK	18	FULL SIZE	ALC	APPROVED	FRASER CHEAM	5
23	CHILLIWACK	CHILLIWACK		DRIVING RANGE		EXISTING	FRASER CHEAM	5
18	CHILLIWACK	CHILLIWACK	18	FULL SIZE		EXISTING	FRASER CHEAM	5
29	MEADOWLANDS	CHILLIWACK	18	FULL SIZE		EXISTING	FRASER CHEAM	5
126	CULTUS LAKE PARK	CHILLIWACK	18	FULL SIZE		EXISTING	FRASER CHEAM	5
28	TOWNSEND	CHILLIWACK	18	PAR 3		EXISTING	FRASER CHEAM	5
77	FRIESEN	CHILLIWACK		DRIVING RANGE	ALC	PENDING	FRASER CHEAM	5
78	DIST OF CHILLIWACK	CHILLIWACK		DRIVING RANGE	ALC	PENDING	FRASER CHEAM	5
82	CHEAM	CHILLIWACK		DRIVING RANGE	ALC	PENDING	FRASER CHEAM	5
73	GREENDALE/CHRYSTAL	CHILLIWACK	18	EXEC	ALC	PENDING	FRASER CHEAM	5
74	PARR	CHILLIWACK	18	EXEC	ALC	PENDING	FRASER CHEAM	5
72	KINCORA-BARR/FORBES	CHILLIWACK	18	EXECUTIVE	ALC	PENDING	FRASER CHEAM	5
79	ELK CREEK/BLACKBURN	CHILLIWACK	27	FULL SIZE	ALC	PENDING	FRASER CHEAM	5
79	ELK CREEK/BLACKBURN	CHILLIWACK	27	FULL SIZE	ALC	PENDING	FRASER CHEAM	5
81	WEDGEWOOD/CEDARHURST	CHILLIWACK	9	EXECUTIVE	ALC	PENDING	FRASER CHEAM	5
80	WEDGEWOOD/CEDARHURST	CHILLIWACK	18	FULL SIZE	ALC	PENDING	FRASER CHEAM	5
119	RANCH RESORT/COLUMBIA VAL.	CHILLIWACK	18	FULL SIZE	ALC	PENDING	FRASER CHEAM	5
125	AQUADEL	CULTUS LAKE	18	PAR 3		EXISTING	FRASER CHEAM	5
143	OAKTREE/HARRISON-AGASSIZ	HARRISON	9	FULL SIZE		EXISTING	FRASER CHEAM	5
25	HOPE	HOPE	9	FULL SIZE		EXISTING	FRASER CHEAM	5
65	VALLEY	MATSQUI		DRIVING RANGE		EXISTING	CENTRAL FRASER VALLEY	5

EXHIBIT B - EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD	GVRD
NAME OF COURSE	BURNABY MOUNTAIN GOLF COURSE	CENTRAL PITCH AND PUTT	KENSINGTON PARK PITCH AND PUTT	VANCOUVER GOLF CLUB
ADDRESS	439 - 4800 KINGSWAY BURNABY	BOUNDARY ROAD BURNABY	5889 CURTIS STREET BURNABY	771 AUSTIN AVENUE COQUITLAM
TELEPHONE	421-7355	434-2727	291-9525	936-3404
LOCATION DESCRIPTION (SITE BOUNDARIES)	Broadway/Phillips	Boundary/49th. Avenue	Park Playing Fields	Mountain/ Foster
MAP NUMBER(S)	#36, #41	#122	#144	#6
LAND AREA ACRES	135	15-17	17	176
MUNICIPALITY	BURNABY	BURNABY	BURNABY	COQUITLAM
CURRENT ZONING	Public Rec & Parks	Public Rec & Parks	Public Rec & Parks	P3 Special Recreation
ADJACENT LAND USE AND ZONING	Single/Two Family Housing Apts/.Multi-purp.	Multiple-housing and Park	Housing/ School	Resisdential : P1//RS1/
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PUBLIC	PRIVATE
OWNERSHIP	MUNICIPAL	MUNICIPAL	MUNICIPAL	PRIVATE
MEMBERSHIP NUMBERS	NONE	NONE	NONE	1350
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES	NO
COMPETITIONS? (Y/N)	-	Not noted	Not noted	YES/BCGA
NUMBER OF HOLES/TYPE	18	18 PAR 3	18 PAR 3	18
PAR LEVEL	71	54	54	70
YARDS	B-6431/W-6211/R-5830	Not noted	Not noted	6433
GREEN FEES	$18 PLUS GST	$5.30 PLUS GST	$5.30 PLUS GST	$30-$35
INITIATION FEES/ANNUAL DUES	NONE	NONE	NONE	$25,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)	88,675	60,000	55,000	53,000-55,000
SERVICES PRO-SHOP	YES	YES	YES	YES
CAR RENTALS	YES	NO	NO	YES
DRIVING RANGE	YES	NO	NO	YES
CLUB HOUSE (GR. SQ. FT.)	Not available	YES	YES	14,000
NO. OF FLOORS/CONSTR DATE	ONE/1986	ONE W. RESIDENCE/1970	ONE W. CHANGE RMS	2/1967
FOOD - RESTAURANT/SEATS	150	NO	NO	YES/140
SNACK BAR/SEATS	See above	NO	NO	YES/100
BANQUET/SEATS	See above	NO	NO	YES/200
LOUNGE/SEATS	40	NO	NO	YES/36
SHOWERS (Y/N)	NO	NO	NO	YES
LOCKERS (Y/N)	NO	NO	NO	YES
OTHER REC. FACILITIES	NO	NONE	NONE	NO
OTHER FAC/MEETING ROOMS	NO	NO	NO	YES/265
HOTEL/RESIDENTIAL	N0	NO	NO	
PARKING SPACES/COST	200/FREE	SHARED/FREE	SHARED/FREE	300/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD	GVRD
NAME OF COURSE	CARNOUSTIE	GREENACRES	MAYFAIR LAKES	MYLORA/MYLORA WEST
	GOLF & RACQUET CLUB	GOLF COURSE	GOLF COURSE	
ADDRESS	533 DOMINION AVENUE	5040 NO. 6 ROAD	5460 NO. 7 ROAD	9911 SIDAWAY ROAD
	PORT COQUITLAM	RICHMOND	RICHMOND	RICHMOND
TELEPHONE	941-5233	273-1121	276-0585	271-5626
LOCATION DESCRIPTION	Dominion and Burns	No.6 Road and	No.7 Road/New	N0. 5 Road/Williams
(SITE BOUNDARIES)		New Westminster Highway	Westminster Highway	
MAP NUMBER(S)	#1, #54	#38	#39, #60	#40, #147, #148
LAND AREA ACRES	110	88	143	37.5/ 38.1
MUNICIPALITY	PORT COQUITLAM	RICHMOND	RICHMOND	RICHMOND
CURRENT ZONING	P3 Golf Course	AG2 Golf Course Zone	AG2 Golf Course	AG2 Golf Course
ADJACENT LAND USE	ALR, Apartments,	AG1/I3/Agric. District/	AG1/R1/Agric. District/	AG1/R3/LUC/R1/C1/AS1
AND ZONING	School	Park/Industrial District	Single Family Housing	Ag/Multi-housg/Commercl, etc
CLUB/COURSE TYPE	PUBLIC/SEMI-PRIVATE	PUBLIC	PUBLIC	PUBLIC
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	112/200 associates	300	NOT AVAILABLE	N/A
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES	YES
COMPETITIONS? (Y/N)	YES	YES	YES	YES
NUMBER OF HOLES/TYPE	18	18	18	18
PAR LEVEL	72	69	72	57
YARDS	6155	6023	B-6609/W-5733/R-5320	3006
GREEN FEES	$24-$28	NOT NOTED	NOT AVAILABLE	
INITIATION FEES/ANNUAL DUES	$2,000/SR. MALE	NOT NOTED	NOT AVAILABLE	N/A
ROUNDS PLAYED (12 MONTHS)	55,000	63,000	50,000	
SERVICES PRO-SHOP	YES	YES	YES	YES
CAR RENTALS	YES	YES	YES	NO
DRIVING RANGE	YES	NO	YES	NO
CLUB HOUSE (GR. SQ. FT.)	30,000	11,000	15,000	
NO. OF FLOORS/CONSTR DATE	TWO/1984	1/NOT NOTED	1/1989	
FOOD - RESTAURANT/SEATS	YES/110	82	94	YES/60
SNACK BAR/SEATS	YES/40	80	NO	NO
BANQUET/SEATS	YES	200	250	NO
LOUNGE/SEATS	YES/100	84	NO	NO
SHOWERS (Y/N)	YES	NO	YES	NO
LOCKERS (Y/N)	YES	NO	YES	NO
OTHER REC. FACILITIES	4 COURTS	NO	NO	NO
OTHER FAC/MEETING ROOMS	YES/64	NO	YES	NO
HOTEL/RESIDENTIAL	NO	NO	NO	NO
PARKING SPACES/COST	325/FREE	NOT NOTED	250/FREE	/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	RICHMOND	WEST RICHMOND PITCH AND PUTT	UNIVERSITY GOLF CLUB
ADDRESS	9100 STEVESTON HIGHWAY RICHMOND	9771-PENDLETON ROAD RICHMOND	STN. G, PO BOX 41638 VANCOUVER
TELEPHONE	277-3141	271-7333	224-7799
LOCATION DESCRIPTION (SITE BOUNDARIES)	Steveston Highway/Garden/ City Road	Francis Rd./#1 Hwy.	Blanca, University Blvd., College High Road
MAP NUMBER(S)	#8	#149	#17, #56
LAND AREA ACRES	130	13.8	155
MUNICIPALITY	RICHMOND	RICHMOND	UNIV. ENDOWMENT LANDS
CURRENT ZONING	AG2 Golf Course District	LUC 009	Park
ADJACENT LAND USE AND ZONING	AG1 (Agric), R1 (Single Fam)	S/P(School), R1 (Single Fam)	Park/Single family
CLUB/COURSE TYPE	PRIVATE	PUBLIC	PUBLIC/SEMI-PRIVATE
OWNERSHIP	PRIVATE	MUNICIPAL	PRIVATE
MEMBERSHIP NUMBERS	750 FAMILIES	N/A	700
PAY-AS-YOU-PLAY (Y/N)	NO	YES	YES
COMPETITIONS? (Y/N)	YES	NO	YES
NUMBER OF HOLES/TYPE	18	9	18
PAR LEVEL	72	27	72
YARDS	B-6630/W-	680	B-6584/W-6147/R-5653
GREEN FEES	$25-$60	$2.75 -$4.0	$27-$32
INITIATION FEES/ANNUAL DUES	$18,000/SR. MALE/$1992	NO	$550/SR. MALE
ROUNDS PLAYED (12 MONTHS)	53,000		65,000
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	NO	YES
DRIVING RANGE	YES	NO	YES
CLUB HOUSE (GR. SQ. FT.)	50,000		19,000
NO. OF FLOORS/CONSTR DATE	2/1981	1963	TWO/1986
FOOD - RESTAURANT/SEATS	YES/96	NO	YES/N/A
SNACK BAR/SEATS	30	YES	YES/N/A
BANQUET/SEATS	150-200	NO	NO
LOUNGE/SEATS	40-60	NO	NO
SHOWERS (Y/N)	YES	NO	YES
LOCKERS (Y/N)	YES	NO	YES
OTHER REC. FACILITIES	YES/1 COURT	NO	NO
OTHER FAC/MEETING ROOMS	YES/300	NO	YES/200
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	235/FREE	20	250/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	FRASERVIEW	MUSQUEAM	POINT GREY
	GOLF COURSE	GOLF CLUB	GOLF CENTRE
ADDRESS	7800 VIVIAN STREET	3904, WEST 51ST. AVE	3350 S.W. MARINE DRIVE
	VANCOUVER	VANCOUVER	VANCOUVER
TELEPHONE	327-3717	266-2334	261-3108
LOCATION DESCRIPTION	S.E. Marine Drive/	S. W. Marine Drive/	S. W. Marine/Blenheim
(SITE BOUNDARIES)	Kerr Street	Salish	
MAP NUMBER(S)	#52, #62	#53, #63	#5
LAND AREA ACRES	215	55	141.3
MUNICIPALITY	VANCOUVER	INDIAN LAND	VANCOUVER
CURRENT ZONING	RS-1/Single Family		RA-1/RS-1
ADJACENT LAND USE	RS-1/CD-1	Golf/Reserve	RS-1/RA-1
AND ZONING			
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PRIVATE
OWNERSHIP	MUNICIPAL	PRIVATE	
MEMBERSHIP NUMBERS	NONE	Not available	
PAY-AS-YOU-PLAY (Y/N)	YES	YES	
COMPETITIONS? (Y/N)	YES	YES	
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	71	60	72
YARDS	6343	3322	B-6672/W-6277/R-
GREEN FEES	19	$16-$18	$25-$65
INITIATION FEES/ANNUAL DUES	NONE	Not available	$22,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)	92,000	65,000	
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	YES	YES
DRIVING RANGE	YES	YES	YES
CLUB HOUSE (GR. SQ. FT.)	N.A.	1,800	18,000
NO. OF FLOORS/CONSTR DATE	THREE/HERITAGE BLDG.	TWO/40 years	
FOOD - RESTAURANT/SEATS	YES/100	NO	YES/50
SNACK BAR/SEATS	NO	35	NO
BANQUET/SEATS	NO	NO	NO
LOUNGE/SEATS	NO	NO	NO
SHOWERS (Y/N)	NO	NO	YES
LOCKERS (Y/N)	NO	NO	YES
OTHER REC. FACILITIES	NO	NO	NO
OTHER FAC/MEETING ROOMS	NO	NO	YES/160
HOTEL/RESIDENTIAL	NO	NO	
PARKING SPACES/COST	190/FREE	200/FREE	

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	QUEEN ELIZABETH	RUPERT	STANLEY PARK
	PITCH AND PUTT	PITCH AND PUTT	PITCH AND PUTT
ADDRESS	QUEEN ELIZABETH PARK	3401 EAST 1ST. STREET	STANLEY PARK
	VANCOUVER	VANCOUVER	VANCOUVER
TELEPHONE	874-8336	253-2530	681-8847
LOCATION DESCRIPTION	W. 37th. Ave./Kersland Dr./	East 1st. Ave./Rupert/	in Stanley Park
(SITE BOUNDARIES)	Cambie St./29th. Ave.	Highway #401	
MAP NUMBER(S)	#137	#135	#136
LAND AREA ACRES	PART OF PARK	PART OF PARK	PART OF PARK
MUNICIPALITY	VANCOUVER	VANCOUVER	VANCOUVER
CURRENT ZONING	RS-1/SINGLE FAMILY	RS-1 /SINGLE FAMILY	RS-1/SINGLE FAMILY
ADJACENT LAND USE	RS-1/RM-3A/RS-1S/CD-1	RS-1/M-1(INDUSTRIAL)	COMPREHENSIVE DVPT
AND ZONING		C-1 (COMMERCIAL)	1ST/RM-5A (MULTIPLE DWEL
CLUB/COURSE TYPE	PUBLIC/PITCH AND PUTT	PUBLIC/PITCH AND PUTT	PUBLIC/PITCH AND PUTT
OWNERSHIP	MUNICIPAL	MUNICIPAL	MUNICIPAL
MEMBERSHIP NUMBERS	NONE	NONE	NONE
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	NO	NO	NO
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	54	54	54
YARDS	1370	1295	1185
GREEN FEES	5	5	5
INITIATION FEES/ANNUAL DUES	NONE	NONE	NONE
ROUNDS PLAYED (12 MONTHS)	55,000	28,600	56,500
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	NO	NO	NO
DRIVING RANGE	NO	NO	NO
CLUB HOUSE (GR. SQ. FT.)	NO	NO	NO
NO. OF FLOORS/CONSTR DATE	N.A.	NO	N/A
FOOD - RESTAURANT/SEATS	NO	NO	NO
SNACK BAR/SEATS	NO	NO	NO
BANQUET/SEATS	NO	NO	NO
LOUNGE/SEATS	NO	NO	NO
SHOWERS (Y/N)	NO	NO	NO
LOCKERS (Y/N)	NO	NO	NO
OTHER REC. FACILITIES	NONE	TENNIS COURTS	NONE
OTHER FAC/MEETING ROOMS	NONE	NO	NONE
HOTEL/RESIDENTIAL	N.A.	NO	N/A
PARKING SPACES/COST	100/FREE	GENERAL	GENERAL

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	1
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	QUILCHENA COUNTRY CLUB	LANGARA GOLF COURSE	MARINE DRIVE
ADDRESS	3551 GRANVILLE AVENUE RICHMOND	290 WEST 49TH. AVENUE VANCOUVER	7425 YEW STREET VANCOUVER
TELEPHONE	277-1101	321-8013	261-8111
LOCATION DESCRIPTION (SITE BOUNDARIES)	Blundell/No.1 Road	W49th./Ontario St./ 58TH. Avenue Rt.-of-Way	Marine Drive/Yew
MAP NUMBER(S)	#2	#134	#3
LAND AREA ACRES	125	123	98
MUNICIPALITY	RICHMOND	VANCOUVER	VANCOUVER
CURRENT ZONING	AG2 Golf Course	RS-1/Single Family	
ADJACENT LAND USE AND ZONING	AG1, Single Family Housing, School & Public Use	RS-1/CD-1/RT-2/RS-1	
CLUB/COURSE TYPE	PRIVATE	PUBLIC	PRIVATE
OWNERSHIP	MEMBERS	MUNICIPAL	
MEMBERSHIP NUMBERS	1138	NONE, BUT 2 CLUBS	
PAY-AS-YOU-PLAY (Y/N)	NO	YES	
COMPETITIONS? (Y/N)	7 PER YEAR	YES	
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	70/73	71	71
YARDS	B-6478/W-6340/R-5583	6269	B-6325/W-6134/R-5860
GREEN FEES	$30-$35	19	$25-$60
INITIATION FEES/ANNUAL DUES	$19,500/SR. MALE	NONE	$21,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)	57,881	80,000	
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	YES	YES
DRIVING RANGE	YES	NO	YES
CLUB HOUSE (GR. SQ. FT.)	21,000	380 GR.SQ.FT.	24,000
NO. OF FLOORS/CONST'R DATE		THREE/HERITAGE BUILDING	
FOOD - RESTAURANT/SEATS	YES/55	YES/99	YES/122
SNACK BAR/SEATS	YES/6	NO	YES/15
BANQUET/SEATS	NO	NO	NO
LOUNGE/SEATS	NO	NO	NO
SHOWERS (Y/N)	YES	NO	YES
LOCKERS (Y/N)	YES	NO	YES
OTHER REC. FACILITIES	NO	TENNIS COURTS	NO
OTHER FAC/MEETING ROOMS	YES/N/A	NO	YES/400
HOTEL/RESIDENTIAL		NO	
PARKING SPACES/COST	222/FREE	NONE	

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	1	1	2
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	MCCLEERY GOLF COURSE	SHAUGHNESSY	SEYMOUR GOLF & COUNTRY CLUB
ADDRESS	1756 WEST 59TH AVENUE VANCOUVER	4300 S.W. MARINE DRIVE VANCOUVER	3723 M'NT SEYMOUR P'KWAY NORTH VANCOUVER
TELEPHONE	261-4522	266-6248	929-5491
LOCATION DESCRIPTION (SITE BOUNDARIES)	S. W. Marine Drive/ Macdonald	Salish/South West Marine Dr.	MS Parkway/Roche Pt. Dr./Fairway Dr.
MAP NUMBER(S)	#45	#4	#9
LAND AREA ACRES	125		140
MUNICIPALITY	VANCOUVER	VANCOUVER	NORTH VANC. DIST.
CURRENT ZONING	RA-1 (LTD AGRICULTURAL)	Single Family Residential	PR0-1 Parks, Rec, Open Space Widerness
ADJACENT LAND USE AND ZONING	RA-1/RS-1		Residential/Institutional Indian Land
CLUB/COURSE TYPE	PUBLIC	PRIVATE	SEMI-PRIVATE
OWNERSHIP	MUNICIPAL		PRIVATE ON MUNICIPAL LAND
MEMBERSHIP NUMBERS	NONE. 2 CLUBS		750
PAY-AS-YOU-PLAY (Y/N)	YES		PARTIAL
COMPETITIONS? (Y/N)	YES		YES
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	72	73	71/72
YARDS	6332	B-6705/W-6293/G-5764	B-6244/W-5979
GREEN FEES	19	75	26
INITIATION FEES/ANNUAL DUES	NONE	$18,000/SR. MALE	$16,000/SR. MALE/$96 MONTHLY
ROUNDS PLAYED (12 MONTHS)	73,000		70,000
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	YES	YES
DRIVING RANGE	NO	NO	YES
CLUB HOUSE (GR. SQ. FT.)	YES	N/A	18,000
NO. OF FLOORS/CONSTR DATE	ONE /1958/59	N/A	TWO/1985
FOOD - RESTAURANT/SEATS	YES/80/28 PATIO	YES/180	YES/60
SNACK BAR/SEATS	NO	YES/150	YES/200
BANQUET/SEATS	NO	NO	YES/60
LOUNGE/SEATS	NO	NO	YES/78
SHOWERS (Y/N)	YES	YES	YES
LOCKERS (Y/N)	YES	YES	YES
OTHER REC. FACILITIES	NONE	NO	NO
OTHER FAC/MEETING ROOMS	NONE	YES/400	YES/200
HOTEL/RESIDENTIAL	NO		NO
PARKING SPACES/COST			200/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	2	2	2	2
REGIONAL DISTRICT	GVRD	GVRD	GVRD	GVRD
NAME OF COURSE	MURDO FRASER PAR 3 GOLF COURSE	AMBLESIDE PITCH AND PUTT	CAPILANO GOLF & COUNTRY CLUB	GLENEAGLES GOLF & COUNTRY CLUB
ADDRESS	2700 PEMBERTON NORTH VANCOUVER	1201, MARINE DRIVE WEST VANCOUVER	420 SOUTHBOROUGH DRIVE WEST VANCOUVER	PO BOX 91064 WEST VANCOUVER
TELEPHONE	980-8410	922-3818	922-9331	921-7353
LOCATION DESCRIPTION (SITE BOUNDARIES)	Off Capilano Road	Ambleside Park	Southborough/Stevens	Marine Drive/ Gleneagles Dr./ St. Georges Ave.
MAP NUMBER(S)	#130	#138	#7	#43
LAND AREA ACRES		PART OF PARK	165	110
MUNICIPALITY	NORTH VANC. DIST.	WEST VANCOUVER	WEST VANCOUVER	WEST VANCOUVER
CURRENT ZONING	PRO-1	Major Recreational	Established Neighbourhood	Major Recreational
ADJACENT LAND USE AND ZONING		Ambleside Neighbourhood Regional Centre	Established Neighbourhood	Single Family
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PRIVATE	PUBLIC
OWNERSHIP	MUNICIPAL	MUNICIPAL	MEMBERS	MUNICIPAL
MEMBERSHIP NUMBERS			Not Available	
PAY-AS-YOU-PLAY (Y/N)	YES	YES	NO	YES
COMPETITIONS? (Y/N)	YES	YES	YES	
NUMBER OF HOLES/TYPE	9	18	18	9
PAR LEVEL	27	54	70/72	70
YARDS	628	114	B-6578/W	2785
GREEN FEES	$2.75 - $3.25	$3.25-$5.75	100	ADULT $7.50/SNR $4.50
INITIATION FEES/ANNUAL DUES	N/A	N/A	$25,000/SR. MALE	
ROUNDS PLAYED (12 MONTHS)			Not available	65,000
SERVICES PRO-SHOP	NO	NO	YES	
CAR RENTALS	NO	NO	YES	
DRIVING RANGE	NO	NO	NO	
CLUB HOUSE (GR. SQ. FT.)			30,000	400 SQ.FT.
NO. OF FLOORS/CONSTR DATE			THREE/1938	
FOOD - RESTAURANT/SEATS	NO	NO	YES/60	Leased
SNACK BAR/SEATS	NO	YES	YES/60	
BANQUET/SEATS	NO	NO	YES	
LOUNGE/SEATS	NO	NO	YES	
SHOWERS (Y/N)	NO	NO	YES	
LOCKERS (Y/N)	NO	NO	YES	
OTHER REC. FACILITIES	NO	NO	NO	
OTHER FAC/MEETING ROOMS	NO	NO	YES/180	
HOTEL/RESIDENTIAL	NO	NO	NO	
PARKING SPACES/COST			300/FREE	60/120 off site/Free

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	2	2	2	3
REGIONAL DISTRICT	Squamish-Lillooet	Squamish-Lillooet	Squamish-Lillooet	GVRD
NAME OF COURSE	SQUAMISH VALLEY	PEMBERTON VALLEY	WHISTLER	BEACH GROVE
	GOLF & COUNTRY CLUB	GOLF & COUNTRY CLUB	GOLF CLUB	GOLF CLUB
ADDRESS	2458 MAMQUAM ROAD	AIRPORT	4010 WHISTLER WAY	5946 - 12TH AVENUE
	SQUAMISH	PEMBERTON	WHISTLER	DELTA
TELEPHONE	898-5484	894-5122	932-4607	943-1155
LOCATION DESCRIPTION	Bordered on south by	Airport Rd./Hwy. 99	Hway #99/Blueberry Dr./	56A St./12th. Ave.
(SITE BOUNDARIES)	Mamquam River		Subdivision Whistler Estates	
MAP NUMBER(S)	#16	#140	#42	#35
LAND AREA ACRES	148		120	Not noted
MUNICIPALITY	SQUAMISH	PUBLIC	RESORT MUN. OF WHISTLER	DELTA
CURRENT ZONING	Park	Crown Land	RR1/Rural Resort 1	C5
ADJACENT LAND USE	Residential/Resource		Commercial/Tourist Accom./	Residential RS/RM
AND ZONING			Multiple and Single Family	
CLUB/COURSE TYPE	PRIVATE/SEMI-PRIVATE	PUBLIC	PUBLIC/MUNICIPAL	PRIVATE
OWNERSHIP	Land : Squamish Dist/Club lease	MEMBERSHIP	RESORT/CHAMPIONSHIP	MEMBER
MEMBERSHIP NUMBERS	600 golf/100 curling	250	WEEKDAY USE ONLY	1046
PAY-AS-YOU-PLAY (Y/N)	YES		YES	NO
COMPETITIONS? (Y/N)	YES		YES	YES
NUMBER OF HOLES/TYPE	18	9	18	18
PAR LEVEL	72	36	72	71
YARDS	B-6459/W-6207	3138		B-6004/W-5724
GREEN FEES	23	9		$5/$20/$60
INITIATION FEES/ANNUAL DUES	$4,000/$525	$2,000/ $250		$15,000-$11,250
ROUNDS PLAYED (12 MONTHS)	48,000		30,000	
SERVICES PRO-SHOP	YES	YES	YES	YES
CAR RENTALS	YES	YES	YES	YES
DRIVING RANGE	NO	NO	YES	YES
CLUB HOUSE (GR. SQ. FT.)	5,000	TEMPORARY	N.A.	Not noted
NO. OF FLOORS/CONSTR DATE	ONE		N.A.	2/1965
FOOD - RESTAURANT/SEATS	YES/60	NO	NO	YES/140
SNACK BAR/SEATS	NO	YES	YES	
BANQUET/SEATS	YES/60	NO	SEE ZONING	
LOUNGE/SEATS	YES	PENDING	YES	
SHOWERS (Y/N)	YES	NO	YES	
LOCKERS (Y/N)	YES	NO	YES	
OTHER REC. FACILITIES	YES	NO	SEE ZONING	
OTHER FAC/MEETING ROOMS	NO	NO	SEE ZONING	
HOTEL/RESIDENTIAL	NO	NO	SEE ZONING	
PARKING SPACES/COST		FREE	60/FREE	

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	DELTA	SUNSHINE HILLS	TSAWWASSEN
	GOLF CLUB	GOLF COURSE	GOLF COURSE
ADDRESS	11550 TRUNK ROAD	10646 64TH. AVENUE	1595 - 52ND STREET
	DELTA	DELTA	DELTA
TELEPHONE	594-8509	596-0533	943-2288
LOCATION DESCRIPTION	120th. (Scott Road)	Hwy. 91/4th Ave.	52nd. St./16th. Ave
(SITE BOUNDARIES)			
MAP NUMBER(S)	#37	#64, #145	#15,#55
	Highway 91		
LAND AREA ACRES	88		80
MUNICIPALITY	DELTA	DELTA	DELTA
CURRENT ZONING	A1	C5	C5
	Hobby farms/A1	Hobby farms/A1	Residential/Agriculture
ADJACENT LAND USE			A1/RS
AND ZONING			
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PUBLIC/SEMI-PRIVATE
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	Not available	N/A	150
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	Not noted	NO	YES
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	69	54	65
YARDS	B-5792	2303	W-4406
GREEN FEES	$12-$19	$7.50 - $9.00	$15-$18
INITIATION FEES/ANNUAL DUES	Special situation	N/A	$2,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)	40,000		Not noted
SERVICES PRO-SHOP	YES	NO	YES
CAR RENTALS	YES	NO	YES
DRIVING RANGE	NO	NO	YES
CLUB HOUSE (GR. SQ. FT.)	2,400		15,000
NO. OF FLOORS/CONSTR DATE	One/Temp.		2/1991
FOOD - RESTAURANT/SEATS	NO	NO	YES/120
SNACK BAR/SEATS	30	YES	YES/40
BANQUET/SEATS	NO	NO	NO
LOUNGE/SEATS	50	NO	NO
SHOWERS (Y/N)	NO	NO	NO
LOCKERS (Y/N)	NO	NO	YES
OTHER REC. FACILITIES	NO	NO	YES
OTHER FAC/MEETING ROOMS	NO	NO	NO
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	150/FREE	100/FREE	201/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	LANGLEY GOLF	FORT LANGLEY	NEWLANDS
	CENTRE	GOLF & COUNTRY CLUB	GOLF & RACQUET CLUB
ADDRESS	21550-44TH. AVENUE	782, MCKINNON ROAD	20690 - 46TH STREET
	LANGLEY	FORT LANGLEY	LANGLEY
TELEPHONE	534-4555	888-5911	533-3288
LOCATION DESCRIPTION		McKinnon/Allard Cres.	48th. Ave./2208 St./
(SITE BOUNDARIES)			Old Yale Road
MAP NUMBER(S)	#57,#146	#12	#13
LAND AREA ACRES		108	110
MUNICIPALITY	LANGLEY DISTRICT	LANGLEY DISTRICT	LANGLEY DISTRICT
CURRENT ZONING	RU 10	RU 10	RU 10
	Rural Golf Course	Rural Golf Course	Rural Golf Course
ADJACENT LAND USE			Agricultural/Residential
AND ZONING			
CLUB/COURSE TYPE	PUBLIC	PUBLIC/SEMI-PRIVATE	PRIV./SEMI-PRIV./PUBLIC
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	N/A	160	800 (golf only)
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	NO	NO	YES
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	54	70	72
YARDS	2350	6500	B-6000/W-5600
GREEN FEES	$6.00 -$10.0	$20-$25	$20-$25
INITIATION FEES/ANNUAL DUES	N/A	$1,000/SR. MALE	$5,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)		60,000	55,000
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	NO	YES	YES
DRIVING RANGE	YES	NO	NO
CLUB HOUSE (GR. SQ. FT.)		4000+	100,000
NO. OF FLOORS/CONSTR DATE		ONE/Not noted	TWO/1974+
FOOD - RESTAURANT/SEATS	YES/100	NO	YES/225
SNACK BAR/SEATS		YES/50	YES/60
BANQUET/SEATS	YES	NO	800
LOUNGE/SEATS		YES/90	175
SHOWERS (Y/N)	NO	NO	YES
LOCKERS (Y/N)	NO	NO	YES
OTHER REC. FACILITIES	NO	NO	YES
OTHER FAC/MEETING ROOMS	NO	NO	YES/800
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	60/FREE	150/FREE	765/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	POPPY ESTATE GOLF COURSE	TALL TIMBERS	GREENSIDE GOLF & COUNTRY CLUB
ADDRESS	3834 - 248TH STREET ALDERGROVE	23523-56TH. AVENUE LANGLEY	6000 GREENSIDE DRIVE SURREY
TELEPHONE	856-1181	534-0213	530-6169
LOCATION DESCRIPTION (SITE BOUNDARIES)	248th. & Fraser Highway		64th. Avenue/ 188th. St.
MAP NUMBER(S)	#33	#50	#61
LAND AREA ACRES	75	160	15
MUNICIPALITY	LANGLEY DISTRICT	LANGLEY DISTRICT	SURREY
CURRENT ZONING	RU 10	RU 10	PR - Recreation
ADJACENT LAND USE AND ZONING	Rural Golf Course Agricultural	Rural Golf Course Agricultural/Residential	Urban residential/Commercial Suburban Residential/ Urban Residential
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PUBLIC
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	NONE	Not available	TENANTS
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	YES	YES	
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	61	71	54
YARDS	B-6053/W-5941/R-5785	5718	1495
GREEN FEES	$17-$20 INC GST	$14.00 -$17.50	RES. $4-$5/NON RES. $5-$6
INITIATION FEES/ANNUAL DUES	NONE	Not available	
ROUNDS PLAYED (12 MONTHS)	Not available	Not available	2,440 USERS/YR (1988)
SERVICES PRO-SHOP	YES	YES	NO
CAR RENTALS	YES	YES	NO
DRIVING RANGE	NO	NO	NO
CLUB HOUSE (GR. SQ. FT.)	Not available	Not noted	
NO. OF FLOORS/CONSTR DATE	ONE/1988	1.5/1985	U/C
FOOD - RESTAURANT/SEATS	YES/85	NO	NO
SNACK BAR/SEATS	YES/85	NO	NO
BANQUET/SEATS	NO	NO	NO
LOUNGE/SEATS	NO	NO	NO
SHOWERS (Y/N)	NO	NO	NO
LOCKERS (Y/N)	NO	NO	NO
OTHER REC. FACILITIES	NO	NO	NO
OTHER FAC/MEETING ROOMS	NO	N0	NO
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	200/FREE	Not noted	FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	COYOTE CREEK GOLF & COUNTRY CLUB	GUILDFORD GOLF & COUNTRY CLUB	HAZELMERE GOLF & COUNTRY CLUB
ADDRESS	7778 - 152ND STREET SURREY	7929-152ND STREET SURREY	18150 8TH AVENUE SURREY
TELEPHONE	597-4653	594-0282	538-1212
LOCATION DESCRIPTION (SITE BOUNDARIES)	76th. Ave./152nd. St.	152nd. Ave./80th. St.	8th. Ave./176th. St.
MAP NUMBER(S)	#19,#58	#22	#14
LAND AREA ACRES	60	121	126
MUNICIPALITY	SURREY	SURREY	SURREY
CURRENT ZONING	Agricultural	PR - Recreation	PR- Recreation
ADJACENT LAND USE AND ZONING	Agricultural Suburban Residential	Agricultural Suburban Residential	Agricultural
CLUB/COURSE TYPE	PUBLIC	SEMI-PRIV/PUBLIC PLAY	SEMI-PRIV./PUBLIC PLAY
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	Not available	360	450
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	NO	YES	YES
NUMBER OF HOLES/TYPE	18	18	18
PAR LEVEL	63	70	71/72
YARDS	4000	W-5802	6500
GREEN FEES	$18-$20	WKDAY $10-$15/WKEND $12-$20	WKDAY $$16/WKEND $20/$18-$22
INITIATION FEES/ANNUAL DUES	$4000-$6000/$960	$5,000/$1,200	$3,000/SR. MALE
ROUNDS PLAYED (12 MONTHS)	35,000 (Since Sept 90)	70,000 USERS/YR (1988)	52,000 USERS/YR (1988)
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	YES	YES
DRIVING RANGE	YES	NO	NO
CLUB HOUSE (GR. SQ. FT.)	14,000	5,200	15,000
NO. OF FLOORS/CONSTR DATE	TWO/1990	TWO/1988	ONE/1964
FOOD - RESTAURANT/SEATS	65	YES	YES/80
SNACK BAR/SEATS	38	YES	YES
BANQUET/SEATS	350	YES	250
LOUNGE/SEATS	72	YES	30
SHOWERS (Y/N)	YES	NO	YES
LOCKERS (Y/N)	YES	NO	YES
OTHER REC. FACILITIES	NO	NO	YES
OTHER FAC/MEETING ROOMS	YES	NO	YES
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	275/FREE	FREE	300/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	MERIDIAN	NICO-WYND	PEACE PORTAL
	GOLF		GOLF CLUB
ADDRESS	1054-168TH. STREET	3601 NICO WYND DRIVE	16900 4TH AVENUE
	SURREY	WHITE ROCK	WHITE ROCK
TELEPHONE	536-9313	531-5551	538-4818
LOCATION DESCRIPTION		Nico Wynd Drive/	Highway 99/8th. Avenue
(SITE BOUNDARIES)		Crescent Road	Peace Park Drive
MAP NUMBER(S)	#131	#31	#32
LAND AREA ACRES		41	120
MUNICIPALITY	SURREY	SURREY	SURREY
CURRENT ZONING	PR - Recreation	PR - Recreation	PR-Recreation
ADJACENT LAND USE		Agricultural	Suburban Residential
AND ZONING		Suburban Residential	
CLUB/COURSE TYPE	PUBLIC	PUBLIC/SEMI-PUBLIC	SEMI-PRIV./PUBLIC PLAY
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	35	500	230
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	YES	YES	YES
NUMBER OF HOLES/TYPE	18	9	18
PAR LEVEL	54	70/35	72
YARDS	2040	B-6010/W-5791/R-5572	B-6363/W-6103
GREEN FEES	$9-$10	WKDAY $8-$9/WKEND $12-$15	$27.10-$29.90
INITIATION FEES/ANNUAL DUES	$0/$325	$0/$650	$5000/$1200
ROUNDS PLAYED (12 MONTHS)		40,000 USERS/YR (1988)	65,000 USERS/YR (1988)
SERVICES PRO-SHOP	NO	YES	YES
CAR RENTALS	NO	YES	YES
DRIVING RANGE	NO	NO	NO
CLUB HOUSE (GR. SQ. FT.)			6,900
NO. OF FLOORS/CONSTR DATE	1971		ONE/1979
FOOD - RESTAURANT/SEATS	NO	YES/45	NO
SNACK BAR/SEATS	YES	NO	24
BANQUET/SEATS	NO	YES	NO
LOUNGE/SEATS	NO	NO	84
SHOWERS (Y/N)	NO	NO	YES
LOCKERS (Y/N)	NO	NO	YES
OTHER REC. FACILITIES	NO	NO	NO
OTHER FAC/MEETING ROOMS	NO	NO	NO
HOTEL/RESIDENTIAL	NO	NO	3 RENTAL HOUSES
PARKING SPACES/COST	FREE	FREE	210/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	3	3	3
REGIONAL DISTRICT	GVRD	GVRD	GVRD
NAME OF COURSE	RIVERSIDE	SURREY GOLF COURSE	SUNRISE
	GOLF CENTRE/PAR 3	7700 168TH STREET	
ADDRESS	3600 KING GEORGE HIGHWAY	PO BOX 1074	5640 188TH STREET
	SURREY	CLOVERDALE	SURREY
TELEPHONE	531-3555	576-8224	
LOCATION DESCRIPTION	King George Hwy./Hwy.39	168th. Street/	188th. Street/
(SITE BOUNDARIES)		Fraser Highway	56th. Avenue
MAP NUMBER(S)	#49	#34	#48
LAND AREA ACRES		140	11
MUNICIPALITY	SURREY	SURREY	SURREY
CURRENT ZONING	Pr-Recreation	Pr - Recreation	Industrial
ADJACENT LAND USE	Agricultural	Suburban Residential	Industrial/Suburban Res./
AND ZONING			Urban Res./Commercial
CLUB/COURSE TYPE	PUBLIC	PUBLIC	SEMI-PRIV./PUBLIC PLAY
OWNERSHIP	PRIVATE	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	NO	NO	NO
PAY-AS-YOU-PLAY (Y/N)	YES	YES	
COMPETITIONS? (Y/N)	YES	YES	NO
NUMBER OF HOLES/TYPE	9	18 and 9	9
PAR LEVEL	27	72/32	27
YARDS	2300	B-6610/W-6373/R-5938	1270
GREEN FEES	$5-$6	$12 TO $18	5
INITIATION FEES/ANNUAL DUES			N/A
ROUNDS PLAYED (12 MONTHS)	800	57,000	2,000 USERS/YR (1988)
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	NO	YES	NO
DRIVING RANGE	YES	NO	NO
CLUB HOUSE (GR. SQ. FT.)		Not known	
NO. OF FLOORS/CONSTR DATE		Not reviewed/1970/1979	1983
FOOD - RESTAURANT/SEATS	NO	YES/100	YES/65
SNACK BAR/SEATS	YES	See above	NO
BANQUET/SEATS	NO	YES/140	3 ROOMS
LOUNGE/SEATS	NO	YES	YES
SHOWERS (Y/N)	NO	YES	NO
LOCKERS (Y/N)	NO	YES	NO
OTHER REC. FACILITIES	NO	NO	NO
OTHER FAC/MEETING ROOMS	NO	NO	NO
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	60/FREE	Not reviewed/FREE	60/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	4	4	4
REGIONAL DISTRICT	Dewdney-Alouette	Dewdney-Alouette	Dewdney-Alouette
NAME OF COURSE	EIGHTEEN	HACKER'S	MAPLE RIDGE
	PASTURES	HAVEN	GOLF CLUB
ADDRESS	29110 MATHESON AVENUE	12309-240TH. STREET	20818 GOLF LANE
	MISSION	MAPLE RIDGE	MAPLE RIDGE
TELEPHONE	462-8622	467-3061	465-9221
LOCATION DESCRIPTION	Off 287 Street	Dewdney Trunk Road	Golf Lane/207th. St.
(SITE BOUNDARIES)			
MAP NUMBER(S)	#20	#123	#27
LAND AREA ACRES	179	11	40
MUNICIPALITY	MISSION	MAPLE RIDGE	MAPLE RIDGE
CURRENT ZONING	Pub Rec/Tourist Commerce	Agricultural	Not noted
ADJACENT LAND USE	Rural residential	Agricultural	Residential
AND ZONING			
CLUB/COURSE TYPE	PUBLIC	PUBLIC	PUBLIC
OWNERSHIP	PRIVATE	PRIVATE	MUNICIPALITY
MEMBERSHIP NUMBERS	NO		220
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	YES	NO	YES
NUMBER OF HOLES/TYPE	18	9	9
PAR LEVEL	72		33
YARDS	6812	1000	5062
GREEN FEES	$16 - $20	$4.50 - $5.00	$10.50 FOR 9-$21.00 FOR 18
INITIATION FEES/ANNUAL DUES	NONE	NONE	$510
ROUNDS PLAYED (12 MONTHS)	15,000	NOT AVAILABLE	30,000
SERVICES PRO-SHOP	YES	NO	NO
CAR RENTALS	YES	NO	YES
DRIVING RANGE	NO	NO	NO
CLUB HOUSE (GR. SQ. FT.)	6,000	NO	NO
NO. OF FLOORS/CONSTR DATE	ONE FLOOR/1988	SHOP/1 FLOOR	NO
FOOD - RESTAURANT/SEATS	YES/250	NO	NO
SNACK BAR/SEATS	SEE ABOVE	NO	NO
BANQUET/SEATS	SEE ABOVE	NO	NO
LOUNGE/SEATS	SEE ABOVE	NO	YES
SHOWERS (Y/N)	NO	NO	NO
LOCKERS (Y/N)	NO	NO	NO
OTHER REC. FACILITIES	NO	NONE	NO
OTHER FAC/MEETING ROOMS	NO	NO	NO
HOTEL/RESIDENTIAL	NO	NO	NO
PARKING SPACES/COST	100/FREE	30/FREE	100/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	4	4	5
REGIONAL DISTRICT	Dewdney-Alouette	Dewdney-Alouette	Central Fraser Valley
NAME OF COURSE	MISSION	PITT MEADOWS	LEDGEVIEW
	GOLF & COUNTRY CLUB	GOLF CLUB	GOLF & COUNTRY CLUB
ADDRESS	PO BOX 3161	13615 HARRIS ROAD	PO BOX 152
	MISSION	PITT MEADOWS	ABBOTSFORD/MATSQUI
TELEPHONE	826-7617	465-5431	859-8993
LOCATION DESCRIPTION			35997, McKee Road
(SITE BOUNDARIES)			Matsqui border
MAP NUMBER(S)	#30	#11	#26
LAND AREA ACRES	63	130	130
MUNICIPALITY	MISSION	PITT MEADOWS	ABBOTSFORD/MATSQUI
CURRENT ZONING		Non-profit business	P1/Institutional
ADJACENT LAND USE	Residential/Agricultural	Agricultural	Agricultural land
AND ZONING			
CLUB/COURSE TYPE	PUBLIC/SEMI-PRIVATE	SEMI-PRIVATE	PUBLIC
OWNERSHIP	CLUB MEMBERS	CLUB MEMBERS	MUNICIPAL CORP.
MEMBERSHIP NUMBERS	350	710	350/500 PLAYERS
PAY-AS-YOU-PLAY (Y/N)	NO	LIMITED	25,000 ROUNDS
COMPETITIONS? (Y/N)	Not noted	YES	YES/10,000 ROUNDS
NUMBER OF HOLES/TYPE	9	18	18
PAR LEVEL	71	72	70
YARDS	6045	B-6515/W-6315/R-5801	B-6131/W-5748/R-4942
GREEN FEES	NONE	35	$30 WEEKENDS/$24 WEEK
INITIATION FEES/ANNUAL DUES	$670	$15,000/SR. MALE/$1,200 PA	
ROUNDS PLAYED (12 MONTHS)	50,000 approx	60,000	45,000 (INC 15,000 GREEN FEE)
SERVICES PRO-SHOP	YES	YES	YES
CAR RENTALS	YES	YES	
DRIVING RANGE	NO	YES	
CLUB HOUSE (GR. SQ. FT.)	Not known	12,311	4,500 GSF
NO. OF FLOORS/CONSTR DATE	TWO/1978	1/1964	2
FOOD - RESTAURANT/SEATS	100	YES/100	150
SNACK BAR/SEATS	in above	NO	NO
BANQUET/SEATS	in above	NO	SEE ABOVE
LOUNGE/SEATS	in above	NO	NA
SHOWERS (Y/N)	YES	YES	YES
LOCKERS (Y/N)	YES	YES	NO
OTHER REC. FACILITIES	NO	NO	NO
OTHER FAC/MEETING ROOMS	NO	NO	NO
HOTEL/RESIDENTIAL	NO		NO
PARKING SPACES/COST	100/FREE	200/FREE	130/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	5	5	5	5
REGIONAL DISTRICT	Central Fraser Valley	Fraser-Cheam	Fraser-Cheam	Fraser-Cheam
NAME OF COURSE	WAYSIDE	AQUADEL	CHILLIWACK	CULTUS GOLF PARK
	PAR 3	GOLF COURSE	GOLF & COUNTRY CLUB	
ADDRESS	35036, S. PARALLEL ROAD	1859 COLUMBIA VALLEY HWY.	PO BOX 49	4000 COLUMBIA VAL HWY.
	ABBOTSFORD	CULTUS LAKE	SARDIS	CULTUS LAKE
TELEPHONE	852-3477	858-6896	823-6521/823-4544	
LOCATION DESCRIPTION	South of Highway	Near Cultus Lake	Yale Road West	Cultus Lake Park
(SITE BOUNDARIES)	Near Whatcom Road			
MAP NUMBER(S)	#120	#125	#18,#23	#126
LAND AREA ACRES	27	25.5	190 approx	40
MUNICIPALITY	ABBOTSFORD	FRASER-CHEAM R.D.	CHILLIWACK	CULTUS LAKE PARK BOARD
CURRENT ZONING	Agricultural	R-RURAL	Not noted	P-1 (PARK)
ADJACENT LAND USE	Agricultural	CHP(CAMPGROUND/P-1 (PARK)	Agricultural/Industrial	CULTUS LAKE PARK
AND ZONING		P-2 (PARKE RESERVE)		
CLUB/COURSE TYPE	PUBLIC	PUBLIC	SEMI-PRIVATE	PUBLIC
OWNERSHIP	PRIVATE	PRIVATE	CLUB MEMBERS	PUBLIC
MEMBERSHIP NUMBERS	NOT AVAILABLE	240	750 (1,000 shareholders)	NONE
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES	YES
COMPETITIONS? (Y/N)	YES	YES	YES	
NUMBER OF HOLES/TYPE	18/PAR 3	18 EXECUTIVE PAR 3	18	9 (9 PLANNED)
PAR LEVEL	NOT NOTED	55	71	62
YARDS	2035		B-6155/W-5940/R-5789	
GREEN FEES	$10- $11	$11 DAY/$13 WEEKENDS	30	$7.59 FOR 9/15.00 FOR 18
INITIATION FEES/ANNUAL DUES	NONE	NO FEES	$5000-$8000/$875-$1400	NONE
ROUNDS PLAYED (12 MONTHS)	NOT KNOWN	33,500	NOT AVAILABLE	44,000 ANTICIPATED 1991
SERVICES PRO-SHOP	YES	YES	YES	YES
CAR RENTALS	NO	NO	YES	NO
DRIVING RANGE	NO	NO - DRIVING CAGE	YES	YES
CLUB HOUSE (GR. SQ. FT.)	NOT AVAILABLE	2,400	10,000 approx.	6000/UNDER CONST.
NO. OF FLOORS/CONSTR DATE	1/1971	ONE/1980/1989	2/1958	TWO/LUMBER FRAME
FOOD - RESTAURANT/SEATS	NO	108 INSIDE/40 OUTSIDE	120	150 INSIDE/100 OUTSIDE
SNACK BAR/SEATS	YES/30	NO	120	NO
BANQUET/SEATS	NO	NO		NO
LOUNGE/SEATS	NO	NO	with Snack bar	NO
SHOWERS (Y/N)	NO	NO	YES	NO
LOCKERS (Y/N)	NO	NO	YES	YES
OTHER REC. FACILITIES	NONE	NO	NO	NO
OTHER FAC/MEETING ROOMS	NONE	NO	YES	NO
HOTEL/RESIDENTIAL	NO	NO	NO	NO
PARKING SPACES/COST	200/FREE	70-80/FREE	100 approx./FREE	130/FREE

EXISTING GOLF COURSES IN THE STUDY AREA

SUB-REGION	5	5	5
REGIONAL DISTRICT	Fraser-Cheam	Fraser-Cheam	Fraser-Cheam
NAME OF COURSE	HOPE	MEADOWLANDS	TOWNSEND/PLAYERS ARMS
	GOLF CLUB	GOLF SOCIETY	GOLF COURSE
ADDRESS	PO BOX 197	47823 YALE ROAD EAST	45025 WOLFE ROAD
	HOPE	CHILLIWACK	CHILLIWACK
TELEPHONE	869-5881	792-2276	792-4414
LOCATION DESCRIPTION (SITE BOUNDARIES)	Central Hope	2 Miles East of Chilliwack	Wolfe near Hodkins
MAP NUMBER(S)	#25	#29	#28
LAND AREA ACRES	Not available		8.5
MUNICIPALITY	HOPE	CHILLIWACK	CHILLIWACK
CURRENT ZONING	Not noted		Agriculture
ADJACENT LAND USE AND ZONING	Agricultural/residential		Indian Land/Agriculture
CLUB/COURSE TYPE	PUBLIC/SEMI PRIVATE	PUBLIC	PUBLIC
OWNERSHIP	PUBLIC	PRIVATE	PRIVATE
MEMBERSHIP NUMBERS	150	200	NONE
PAY-AS-YOU-PLAY (Y/N)	YES	YES	YES
COMPETITIONS? (Y/N)	YES	YES	Not reviewed
NUMBER OF HOLES/TYPE	9	18	9
PAR LEVEL	72	68	NO PAR LEVEL
YARDS	W-6279	5072	Under development
GREEN FEES	19	$16-$22	5
INITIATION FEES/ANNUAL DUES	$600	$0/$650	NONE
ROUNDS PLAYED (12 MONTHS)	NOT AVAILABLE		Not known/Open since Sept 1990
SERVICES PRO-SHOP	YES	YES	NO
CAR RENTALS	YES	YES	NO
DRIVING RANGE	YES	NO	
CLUB HOUSE (GR. SQ. FT.)	5600 approx	TEMP	NOT DESCRIBED AS SUCH
NO. OF FLOORS/CONSTR DATE	2/Not noted	TEMP	
FOOD - RESTAURANT/SEATS	45	NO	YES/86
SNACK BAR/SEATS	see above	NO	See above
BANQUET/SEATS	125	NO	See above
LOUNGE/SEATS	See above	30	125
SHOWERS (Y/N)	YES	NO	NO
LOCKERS (Y/N)	YES	NO	NO
OTHER REC. FACILITIES	NO	NO	Not noted
OTHER FAC/MEETING ROOMS	NO	NO	
HOTEL/RESIDENTIAL	NO	NO	
PARKING SPACES/COST	200/FREE	FREE	60/FREE

EXHIBIT "C"

Boundary Bay Conservation Committee
P.O. Box 1251
Delta, B.C.
V4M ~~3K6~~ 3Y8

January 18, 1991

W. Graham Argyle & Associates
Fourth Floor, 1286 Homer Street,
Vancouver, B.C.
V6B 2Y5

Attention: Mr. W.G. Argyle

Dear Mr. Argyle,

In response to your letter of November 27th, 1990, the Boundary Bay Conservation Committee welcomes the opportunity to provide information and comments on the issue of golf courses in the Lower Mainland.

The Boundary Bay Conservation Committee is an umbrella organization representing eleven groups working for the preservation of wildlife habitat, farmland and a clean environment in the Lower Mainland. We represent such groups as the Vancouver Natural History Society, the Sierra Club, the Federation of B.C. Naturalists, the Western Canada Wilderness Committee and many others listed in an enclosed brochure.

The municipality of Delta has been the recipient of over 12 new golf course proposals since Order-In-Council 1141/88 was passed by Cabinet in June, 1988. Since that date, the issue of golf courses on the Agricultural Land Reserve has become extremely contentious in Delta. It was a central issue during the recent municipal election: the newly-elected council, consequently, has passed a motion to request that the provincial government withdraw Order-In-Council 1141. The Boundary Bay Conservation Committee has repeatedly called for the repeal of this O.I.C. and requests that your report reflects the concerns of Delta and recommends the withdrawal of O.I.C 1141. The appeal for the withdrawal of O.I.C. 1141 has also been made by the 9,000 member B.C. Federation of Agriculture as well as the B.C. Institute of Agrologists. We are enclosing some articles which confirm that golf courses threaten farmland and the farm industry. The Agricultural Land Commission should draw up some very stringent regulations about the location of golf courses on the Agricultural Land Reserve. For example, perhaps golf courses could be permitted only on very poor soils which border urban areas, thereby providing a buffer zone between rural and urban uses. Certainly golf courses should never be permitted to intrude into rural areas. Permission from the Agricultural Land Commission should be mandatory in all cases. In addition, the Environment Land Use Committee should not be able to overrule the A.L.C.

The Lower Mainland is situated on the Fraser Delta. Therefore, it is our responsibility to protect the fragile ecosystem of the delta. We are fortunate to live in an area that is home to the largest number of wintering raptors (hawks, eagles and owls) in Canada. In addition, we provide the only major Canadian link of the Pacific Flyway with 1.4

million birds using the area. For the past two years Ladner has documented the highest number of species in Canada during the Canadian Christmas Bird Count. Migratory birds and raptors rely on farmland for their food supply. Golf Courses destroy this habitat. Only 1% of the Fraser delta has been protected by government legislation. We have already lost 75% of the natural habitat of the Fraser Delta. It is time to take action and protect this internationally significant area. Currently, Canada and the United States have entered into the Pacific Coast Joint Venture agreement which will work towards protecting and securing wildlife habitat. We cannot jeopardize this plan by endorsing widespread use of farmland for golf courses.

It is interesting to note that after Order-In-Council 1141 was passed. the Agricultural Land Commission received over 100 applications for golf courses within the period of about a year. This is more than the sum total of previous applications. It is obvious by some of the proposals put forward that many developers see golf courses as an opportunity to buy cheap farmland and use golf courses as an excuse to build recreational facilities and condominiums. We refer you to the Dornoch Dunes Golf Course proposal in Delta which included 1,000 housing units.

Enclosed are some articles which may be helpful to your study. Included is an article in which Ian Paton, former Chairman of the Agricultural Land Commission, states that there is enough non-agricultural land in the Lower Mainland to handle urban expansion -- including golf courses. When you make your recommendations, please consider his statement. In addition to protecting farmland, please consider protection of shorelines, waterways, and any existing natural habitat that is home to our wildlife --- fish, birds, mammals and insects. We have a responsibility to stop worldwide degradation of our natural environment.

Thank you for informing us of your study and taking the time to incorporate our concerns and suggestions

Yours sincerely,

Susan Jones

Susan Jones
(Director)

943-6406

GOLF COURSE DEVELOPMENT IN THE LOWER MAINLAND

A Study to evaluate the Need and establish Locational Criteria.

23.0 ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

This report would not have been possible without the help and assistance of many people including Mangers of Golf Courses who provided information on request and specifically the following individuals and organizations :-

- Louise M. Argyle
- Kurt Alberts, Director, Community Development, Township of Langley
- Jack S. Belhouse, Assistant Director-Long Range Planning, the District of Burnaby
- Mark S. Betteridge, President, UBC Real Estate Corporation
- Sven Buemann, Regional Liaison Officer, Ministry of Regional Development, B. C. Government
- Peter Bloxham, Planner, Planning and Building Inspection, the District of Burnaby
- A. (Bert) W. Breakwell, Director - Operations and Maintenance, Board of Parks and Recreation, City of Vancouver
- British Columbia Federation of Agriculture
- Doug Brimacome, Director, Parks and Recreation, Township of Langley
- Don Buchanan, Planning Director, District of Coquitlam
- Dorothy Brown, Executive Director, The British Columbia Golf House Society
- Peter Cave, Director of Planning, Regional District of Fraser-Cheam
- Bill Cuff, Co-Chairman, Surrey Municipal Golf Course Association
- Wayne Dickinson, Director, Department of Planning Services, The Corporation of Delta
- Brian Doyle, Subdivision Coordinator, Community Development, Township of Langley
- Don Gardiner, Executive Director, B.C. Golf Association
- Susan Gardner
- Diane Gendron, Manager Corporate Communications, B. C. Transit
- Albert Goodwin, Sales Associate, Vigers (B. C.) Inc.
- Wayne Gordon, Planning Director, District of Abbotsford
- Government of British Columbia,
  - Ministry of the Environment
  - Ministry of Agriculture and Fisheries
- Government of Canada
  - Canadian Wildlife Service
  - Fisheries and Oceans Canada
- David Eger, Pacific Rim Golf Corporation

Carlos Felip, Director of Planning, City of Port Coquitlam
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Paul McIntyre, Director, Business Programs,
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Don Metzler, General Manager, University Golf Club
Paul Moritz, Director of Planning, The District of Matsqui
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Don Metzler, General Manager, University Golf Club
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Fred Smith, Superintendent, Income Facilities, Parks and Recreation,
Corporation of Burnaby
Hugh Sloan, Fraser-Cheam Regional District
R. Bentley Sly, Golf Course Superintendent, Vernon Golf and Country Club
David L. Sullivan, Course Superintendent, Capilano Golf and Country Club
Gerald H. Townsend, Chief, Wildlife Conservation, Pacific and Yukon Region
Canadian Wildlife Service
K. B. Underhill, Regional Research Officer,
Provincial Agricultural Land Commission
Erica Yakemchuk, Manager, Green Acres Golf Course

BIBLIOGRAPHY

All regional and municipal planning departments contributed material to the Study. The information provided is far to lengthy to list. As the Study has indicated, a number of municipalities have completed extensive studies on golf course development. Of particular relevance to the subject was the information from the Corporation of Delta, the Township of Langley, the District of Surrey and the Resort Municipality of Whistler.

The Ministry of Highways and Transportation also provided to the Project Team documents covering the Study Area under the title, "Freedom to Move", a series of studies by regional district transportation committees.

Golfcorp Ventures Inc. provided information from their data base that is also to extensive to list.

Specific documents of importance to the Study were :

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